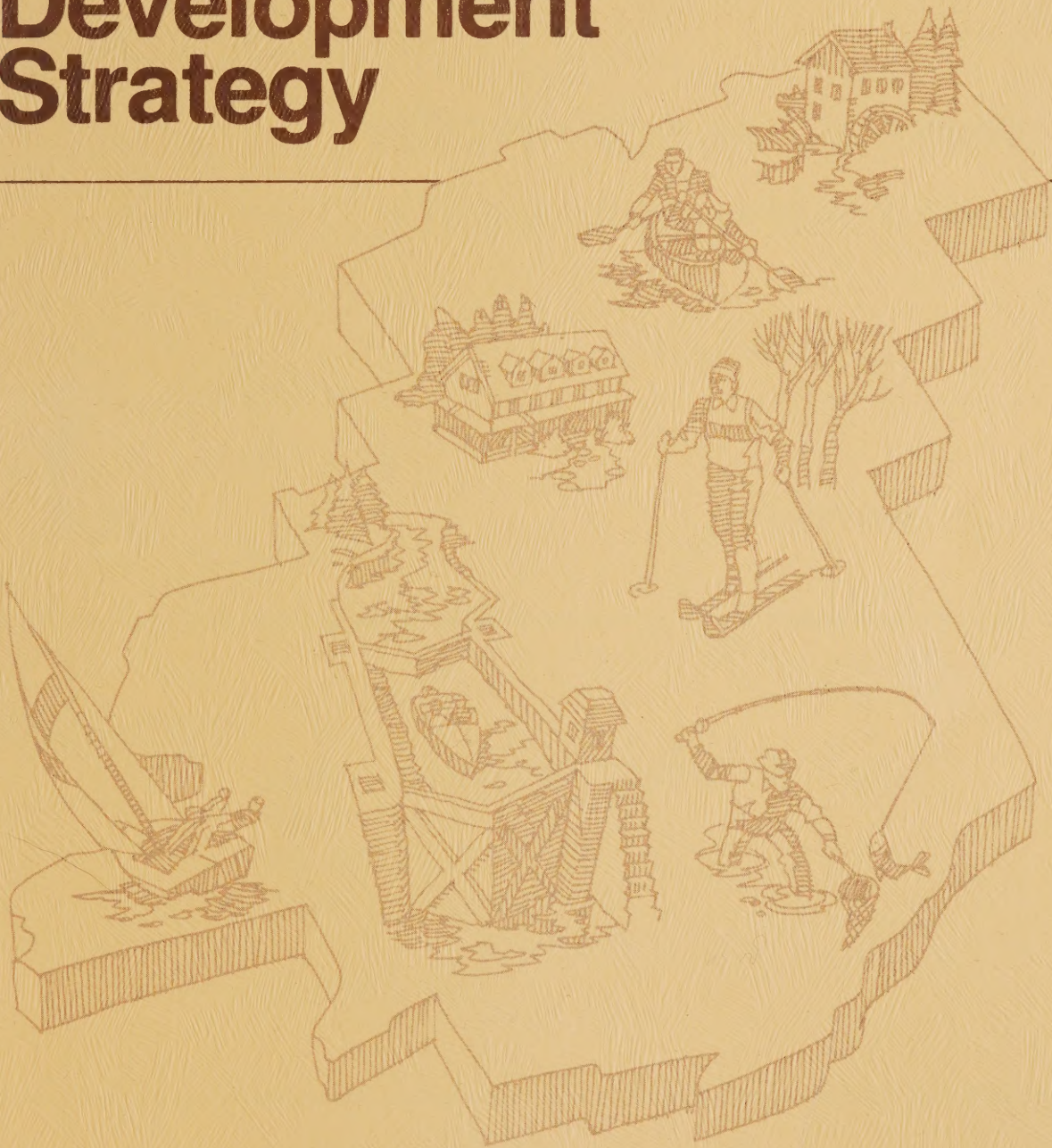




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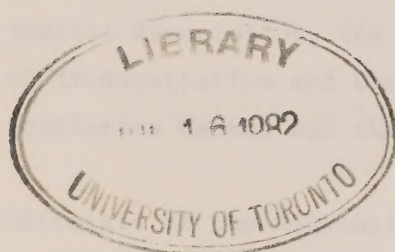
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TOURISM DEVELOPMENT STRATEGY

VOLUME 1

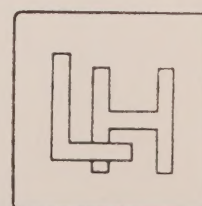


PREPARED FOR:

ONTARIO MINISTRY OF INDUSTRY AND TOURISM
HEARST BLOCK
900 BAY STREET
TORONTO, ONTARIO

SEPTEMBER 1981

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EXECUTIVE SUMMARY

In October 1980, the Ontario Ministry of Industry and Tourism commissioned Laventhol and Horwath to prepare a comprehensive tourism development strategy for the Peterborough-Haliburton zone, one of 17 tourism development zones identified in Tourism Development In Ontario: A Framework for Opportunity.

The strategy outlined in this report provides a framework for guiding private investors and the public sector toward those forms of tourism development which most effectively match the zone's resource potential with market demand. This document is not intended to represent existing or future government policy with respect to tourism. While roles and responsibilities for both the public and private sectors are suggested, the main thrust of the document is to identify an integrated and co-ordinated system of tourism development opportunities of primary interest to the private entrepreneur. The strategy should be regarded as a general guide to development rather than a specific blueprint for individual actions. Further planning and financial feasibility studies will be required prior to the implementation of proposed developments.

While the resources of the zone are capable of providing some of the best tourism and recreation opportunities in the province, it must be recognized that the overall development potential of the zone is limited by the carrying capacity of its two most marketable resources; the Trent-Severn Waterway in the south and the semi-wilderness landscape in the north.

Tourism is one of the strongest contributors to the area's economic base. In 1976 tourism expenditure in the Peterborough-Haliburton zone amounted to approximately \$240 million. Approximately 11.3 million person-trips were attracted to the area in 1980 and it is expected that an additional 1.2 million could be arriving by 1986. Ontario residents represent the largest number of visitors, having generated 10.9 million person-trips

or 97% of total visitation in 1980. Almost one-half of this total, 5.2 million person-trips, was from Metropolitan Toronto. American, Other Canadian and Overseas visitation is much smaller by comparison, generating 276,000, 74,000 and 7,000 person-trips, respectively. Although these markets account for a smaller number of trips, the longer length of stay produces a significant expenditure within the zone.

Water-oriented recreational activities such as swimming, boating and fishing have traditionally been the important activities of the area although, in recent years, trail-oriented activities have gained a higher profile. As specialty markets increase in importance within the tourism industry, recreational boating, tour boating and hut-to-hut cross-country skiing will become significantly more important as tourist attracting activities.

The tourism development potential of the Peterborough-Haliburton zone is critically tied to its natural resource base. As a first step in developing a comprehensive development strategy for the zone the resources and infrastructure (physical, natural, historical, archaeological, recreational, climate, commercial accommodation, food and beverage, events, attractions and transportation) of 19 distinct landscape units were inventoried and evaluated (Map 2). The results of this analysis were then analyzed in the context of the characteristics of the existing geographic and specialty markets and societal trends. Close attention was also paid to environmental sensitivity, resource management and the economic, environmental and social objectives of the zone in particular and the province in general.

Timber harvesting practises, resource preservation philosophies, lake eutrophication, milfoil growth, sport fishery capacity, acid rain and the strain of peak use periods represent issues which must be addressed by both the public and private sectors. To ensure a positive environment for the tourism industry, a more co-ordinated promotion of the zone is required by private entrepreneurs, municipalities, travel and tourism

PETERBOROUGH • HALIBURTON

Tourism Development Strategy

Study Zone



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attraction operators and senior levels of government. In general, there is a parochial attitude towards tourism which has led to local and regionally-oriented development and promotion and resulted in limited awareness of the overall unique natural resources of the zone.

The zone's nationally significant Trent-Severn Waterway and "accessible wilderness" provide unique natural resources with development potential capable of meeting a diverse and expanding market demand.

Inherent in the recommended strategy is a hierarchical structure in which local day-use demands are superceded by the development potential for the entire zone. In devising the tourism development strategy, consideration was also given to specific guidelines related to land-use and marketing concerns.

- | | |
|--|---|
| LOCATION | <ul style="list-style-type: none"> ● Development strategies should be targeted at unique natural resources which provide competitive advantages and away from locations where resources are barriers to effective and sustained operation. |
| WATER-ORIENTATION | <ul style="list-style-type: none"> ● Water and wildlife-oriented development opportunities, in particular, should be located where suitable water surface exists and degradation of the environment is minimized. |
| FOCUS ON URBAN CENTRE INFRASTRUCTURE | <ul style="list-style-type: none"> ● Development strategies should be created to take advantage of less expensive and more efficient support infrastructure, more favourable financial leverage for investors, increased local business and more year-round patronage. |
| INTEGRATE PUBLIC AND PRIVATE SECTOR RESOURCES | <ul style="list-style-type: none"> ● Development strategies should be designed to integrate public resources with private sector tourism operations. |

- TRAVEL
CORRIDORS
 - Development opportunities should be linked together by means of travel corridors.
- EXTENDED
SEASON
 - Supportive activities, events, attractions and festivals should be developed in the shoulder and off-peak seasons.
- COMMUNITY
SUPPORT
 - To the extent that it is possible, development strategies should reflect local attitudes and expectations.
- FOCUS ON
HIGH
CAPABILITY
NODES
 - Development should be concentrated in areas with high year-round potential, provided that a suitable level of resource protection can be provided.
- THEMATIC
IMAGES
 - The attractions, events, facilities and services associated with each tourism area should have strong distinguishable primary and secondary themes.
- TRADITIONAL
MARKETS
 - Development strategies should retain and expand traditional stable markets.
- SPECIALTY
MARKETS
 - Development strategies should encourage the creation of a broader range of more attractive and marketable tourism experiences which cater more closely to specialty markets.
- DAY-USE
MARKETS
 - The day-use needs of local residents and seasonal cottagers and campers should be reflected in the development opportunities.
- INTERNATIONAL
MARKETS
 - Where feasible, development strategies should focus on the resource appeal capable of attracting international markets.
- GROUP
TRAVEL
 - Development nodes should be oriented toward needs of group travellers and mass-transit markets.

The tourism development strategy is structured around:

- Themed nodes of tourism development concentration which possess a particularly attractive combination of natural and man-made resources. These development nodes are typically focussed upon existing tourism facilities, attractions and support services which have already demonstrated some viability and stability. Nodes are identified as either single market day-use, overnight or extended stay development nodes, or as multi-market centres serving a combination of market segments.

Day-use nodes are oriented toward the development of tourism facilities and attractions for use by local residents and transient markets on a non-overnight basis. The mix of attractions, services and facilities developed must be able to satisfy a continuous flow of transient short-stay visitors.

Overnight Nodes are designed to service tourists remaining in the area overnight or for "weekend periods". They must provide many of the same tourist services as day-use nodes but on a more diversified and integrated basis. They require higher quality tourism attractions and more distinctive identities.

Extended Stay Nodes are oriented toward attracting visitors for a longer duration than either day-use or overnight nodes. They must provide a sufficient diversity and quality of attractions, services and facilities to allow repeated use while maintaining a high quality experience.

- Connecting touring corridors which provide access to and linkages between nodes. The touring corridors are both high volume auto and recreational boating routes and low volume hiking, cycling, cross-country skiing, canoeing and snowmobiling trails. Numerous

well developed activity trails already exist in the development zone. Recommendations have been formulated to link existing trails or extend trails for longer distances. Particular opportunities exist for extended hut-to-hut cross-country skiing trails.

- Supporting hinterlands which are adjacent to but not within nodes. They broaden the activity pursuits at points of development concentration. Archaeological and historic attractions and scenic, but environmentally sensitive wildlife viewing points which are site specific but do not lend themselves to nodal concentrations are examples of hinterland development opportunities.

The physical resource and infrastructure analysis revealed that the study zone is comprised of areas of varying resource capability and degrees of existing infrastructure development.

The Peterborough-Haliburton zone encompasses two major tourism development regions aligned on a north-south basis reflecting varying intensities of development, investment potential and marketability. The northern region should capitalize on the draw of the provincially and nationally significant Algonquin Park, the thousands of acres of undeveloped crown land, forested landscapes and remote lakes. The southern region's tourism development potential is intimately tied to opportunities provided by the Trent-Severn Waterway. This corridor is a nationally significant outdoor recreation and historic waterway resource.

The strategy identified the following 15 areas as having significant tourism resource and development potential. (Map 11).

South Lake Simcoe Shoreline	-	Day-use/Overnight/Extended Stay
Rice Lake Area	-	Day-use/Overnight/Extended Stay
Haliburton Area	-	Day-use/Overnight/Extended Stay
Dorset Area	-	Day-use/Overnight/Extended Stay

Whitney	-	Day-use/Extended Stay
Barry's Bay/Mt. Madawaska	-	Extended Stay
Peterborough	-	Day-use/Overnight
Lindsay	-	Day-use/Overnight
Burleigh Falls Area	-	Day-use/Overnight
Bancroft Area	-	Day-use/Overnight
Bobcaygeon Area	-	Day-use/Overnight
Fenelon Falls Area	-	Day-use
Hastings	-	Day-use
Gamebridge Area	-	Day-use
Rosedale	-	Day-use

In addition to the identification of development opportunities and strategy relationships, a development orientation, theme and intent was also derived for each development node.

A summary of each of the development nodes and associated development opportunities follows.

South Lake Simcoe Shoreline Development Strategy

As a consequence of its water resource, and close proximity to Toronto, the South Lake Simcoe Shoreline has emerged as a heavily developed summer resort and cottage area. Because of the overriding importance of the water resource to this area, many of the development opportunities are concentrated on the waterfront. In addition, several events and urban-oriented attractions have been recommended to complement the waterfront activities.

The development strategy for this mode is based upon the creation of new commercial attractions and facilities in keeping with the four season resort destination potential and the marine activity and outdoor

recreation theme. The development intent is to increase day-use, overnight and extended stay visitation on a year-round basis.

A new destination resort complex including extensive small meeting conference facilities and recreational amenities is recommended. The resort will have a full complement of indoor and outdoor recreational activities including tennis courts, heated pool, sauna, hot tub, whirlpool, jogging trails and racquetball courts. New docking and launching facilities should be developed as an integral component of both existing and recommended destination resort accommodation operations. The provision of a waterslide and water accessible food and beverage outlets could draw both boaters and travellers to the area. Proposed events such as a half-marathon, wind-surfing competitions, equestrian events and an ice fishing festival should increase the area's prominence in day-use sports-oriented markets.

Rice Lake Area Development Strategy

The Rice Lake area has long been popular for fishing and is known for the large number of environmentally sensitive areas and archaeological sites found along the lake's shoreline. Accessibility, proximity to markets, and a rich natural and historic resource base are all factors which make the Rice Lake area a desirable tourism destination development node.

The development objective for Rice Lake is to increase day-use, overnight and extended stay visitation throughout the year. The recommended developments are designed to capitalize on the natural resource base without destroying its integrity. Fishing should continue to be a primary travel generator, but the development intent is to broaden the range of attractions and facilities available in order to capture other specialty markets while minimizing the fishery pressure. The major identified development opportunity is a new four season resort, including

a 30-unit motor hotel complex, 20 semi-detached cottage units, lounge, dining room and conference facilities, tennis courts, executive golf course and recreation centre.

The dominant theme is the accessible waterway system. Other sub-themes upon which opportunities can be based include the ecological system in the area and the heritage of the native people. Complementing the four season resort development are two other development foci; specifically, the expansion of the Hope Mill-Lang Mill-Century Village heritage area to a year-round attraction including winter events and the development of water-oriented activities other than fishing, such as canoeing, boat tours and scuba diving.

Haliburton Area Development Strategy

The intent of the development strategy for Haliburton is increasing day-use, overnight and extended stay visitation on a year-round basis. "Accessible wilderness" is the dominant theme for the area. Haliburton Village will continue to be the focus of day-use activities and services. The surrounding area will offer opportunities for extensive outdoor recreation and overnight accommodation. Historical and cultural sub-themes based on the lumbering industry and the fur trade should also be represented.

The Village of Haliburton consists of three distinct tourism activity areas. The first focusses on the development of a waterfront park on Head Lake. The first phase of this development includes a beach, boat dock and picnic area. Phase 2 will add a lookout, an amphitheatre, children's play area and a place for unstructured activities for both residents and visitors.

The second activity area, which is located within the business district, should provide specialized recreation facilities, a Trappers' Festival, Maple Syrup Festival and a themed restaurant and cafe. With a view to diversifying the winter attractions within the node it is recommended that the Slide Ride be adapted to permit a toboggan run, similar to the one in Quebec City.

Development opportunities for the Lake Kashagawigamog area comprise the third activity area. These developments concentrate on expanding the trail networks, adding services for trail users and augmenting the quality and quantity of resort accommodation.

The complementarity of the activity areas can be reinforced by linking them with a walking tour which will highlight the community's heritage resource. The general store, rail line and old churches will form an integral part of the tour. In addition the Lake Kashagawigamog area and the Village of Haliburton should be linked via a shuttle bus service. A new four season destination resort is recommended for this node. It should be a first-class facility with extensive conference facilities and indoor and outdoor recreational amenities. Access to the area's snowmobiling and cross-country skiing trails forms an important part of the development concept.

Dorset Area Development Strategy

The development strategy for Dorset involves increasing both day-use and extended stay visitation on a year-round basis. The intent of this strategy is to maintain the Ontario and United States markets and expand the limited Other Canadian and Overseas markets by adding attractions and destination accommodation facilities which capitalize on the natural resource base and "accessible wilderness" theme.

The focus of the development opportunities for the Dorset area is centred on a first-class destination resort with high quality recreational amenities and a full range of services. An indoor pool, sauna, whirlpool, guide service and canoeing, sailing and windsurfing instruction services should be offered either at the resort or in town. A shuttle bus service to downhill skiing at Huntsville should also be developed. Further use could be made of the area's water resource by developing a boat tour on the Lake of Bays. The tour would not only serve the guests at area resorts but day visitors and group tours, as well. Further development and promotion of area canoe, snowmobile and cross-country ski trails as well as a scenic auto tour would enhance the Dorset area as a year-round outdoor recreation area and encourage further penetration of surrounding landscapes. Tourist services such as an interpretive centre and information centre should be present in Dorset. Together, these would heighten tourist awareness and encourage more day-use and repeat visitation.

Whitney Development Strategy

Because of Whitney's distance from major urban markets vis-a-vis communities at the western gate to Algonquin Park, it has not experienced intense development. Tourism development should centre on expanding existing tourist services and, where applicable, creating new facilities and attractions, and, in so doing, aim at attracting day-use and extended stay visitation in other than the summer season. Auto travellers and bus tour groups who are interested in outdoor activities such as hiking, canoeing and cross-country skiing should constitute the primary market segments. The intention is to provide park visitors with amenities and services not available within the park, but complementary to the park's attractions. The themes around which development should occur stress Whitney's role as the eastern gateway to Algonquin Park's accessible wilderness, the natural history of the area and the forest industry.

Existing resorts should be expanded to meet the requirements of the growing tour group market. A combined information and interpretive centre emphasizing the natural history of the area will also increase length of stay and repeat visitation. The recreational trails and canoe routes constitute the key linkages in the Whitney area. They should continue to be well maintained and, where appropriate, extended.

Hut-to-hut skiing within Algonquin Park and between Whitney, Barry's Bay and/or Bancroft will improve the year-round development concept while attracting a larger share of this expanding ski market.

Barry's Bay/Mt. Madawaska Development Strategy

The goal for development in the Barry's Bay development node is to encourage extended stay visitation. The rationale for this strategy is based on the area's ideal environment for outdoor recreation activities in an accessible wilderness setting and its distance from major markets.

The village of Barry's Bay should continue to act as a local service centre for tourism activities. The focus of development should be in the Mt. Madawaska - Lake Kamaniskeg area. The recommended development opportunities should increase the attraction of Mt. Madawaska as a destination and extend and improve the range of services offered to visitors in Barry's Bay. The existing resort accommodation in the Mt. Madawaska area should be expanded and winterized. Amenities such as saunas and hot tubs will be important extras in drawing increased winter patronage. A quality restaurant, arts and craft shop, picnic area and chairlift-skyride are recommended for development in the area of the ski hill. A scenic lookout and hang-gliding centre will create the activity focus at the top. Development opportunities appropriate for the waterfront area include a sailing and windsurfing centre and an outdoor education and wilderness adventure centre capable of handling 100 visitors at a time.

In the village of Barry's Bay, emphasis should be placed on the region's cultural and historic themes. It should stress the unique contribution to early development made by lumbermen, colonization road settlers and the railway. Interpretive signage will be an integral part of the heritage resources walking tour. Included in the tour should be the railway water tower, the Balmoral Hotel and the site of the original lumber camp settlement. Other development opportunities consistent with the lumber and culture themes are a lumbering festival including steeple-jacking, log-rolling and raft building; church suppers; a Polish ethnic festival; and a tour of the lumber company. Colonization roads and abandoned rail lines provide opportunities for developing cross-country skiing, hiking, snowmobiling and scenic automobile tours which link this node with other area attractions.

Peterborough Development Strategy

The natural and heritage resources of Peterborough provide an excellent setting for water-oriented recreation within an urban environment. The tourism development intent for Peterborough is to expand and improve the existing facilities, attractions and services to attract a greater number of day-use and overnight visitors throughout all seasons of the year.

The recommended development strategies should promote the city as a focus for incoming tours and a launching point for further penetration into the surrounding area either by the highways or waterway system. The strategy encompasses three distinct activity centres. The first includes a recreation park to be located proximate to the lock stations. It will be linked to the lift lock and the planned activity centre/exhibition area by a walking trail. The beach, restrooms/change house, paddle boat concession and vita parcour will attract local residents, transient auto passengers and boaters.

A marina containing 150 slips should form the focal point for the second activity centre. The marina should include launching ramps, dry docking, storage areas and repair service, water, electricity and a pump-out

system. Initially 30% of the slips should be available on a seasonal basis. The marina should promote regattas, host the annual hydroplane race and act as a tour centre for the lift lock and proposed Trent-Severn steamer and tour boat cruises. A training school providing a full range of boating lessons should also be housed here. To complement the marina development and create an integrated package, the market plaza should be cosmetically upgraded. Marina-oriented commercial businesses should be encouraged to locate here. As a second phase to this development, and when room-night demand is sufficient, a waterfront hotel, restaurant and small convention complex could be considered.

As a means of enticing visitors and, in particular, boaters to stay-over in the city, an activity centre is proposed for the waterfront-central business district area of Peterborough. Included as integral components should be an arts and crafts market, bull market, amphitheatre, boutiques, sunken gardens, boat docking and bicycle and boat rentals. A summer festival including musical performances, aquatic performances and displays could focus on this area. Themes for the festival might include Peter Robinson and the Irish heritage of Peterborough. This activity centre would be linked with the city's existing historical walking tour and the proposed canoe museum at Trent University by a walking path beside the Otonabee River.

Peterborough should also serve as a tour centre for the surrounding areas. The downhill ski area at Bethany, Kawartha Downs, Century Village, Whetung Indian Craft Centre and the scenic and heritage tour to Lakefield are all within the day-use area of tourists visiting Peterborough.

A winter carnival emphasizing Peterborough's attractiveness as an outdoor winter recreation area is recommended as a development opportunity. Designed to draw visiting spectators and competitors, the carnival would feature sno-cross, snow/ice sculpturing, sleigh rides, hockey tournaments and marathons on ice between the lock stations.

Lindsay Development Strategy

Attracting day-use and overnight visitation throughout the zone, based on the city's nineteenth century significance as a commercial, financial and industrial centre related to lumbering and its relationship with the Trent-Severn Waterway is the development strategy for Lindsay. The early railroad period is an additional development theme. At present, Lindsay is a service centre for cottagers, campers, transient auto travellers and boaters. It provides many of those services not available at other smaller centres in the area. The recommended development strategy is aimed at maintaining and expanding this role.

To capitalize on Lindsay's commercial centre heritage, a streetscape should be created portraying the old banks, bookstores, saloons, theatres and variety stores. Isolated examples of refurbished store fronts already exist on Kent Street. Complementing the streetscape would be a self-guided walking tour of St. Paul's Anglican Church, the Academy Theatre, the Armoury, the Fire Hall, the Town Hall, Cambridge United Church and Kent Street itself. Cafes located along the route representing this early commercial business would serve to improve the quantity and quality of available food and beverage establishments. A Heritage Festival with street dances, costume balls and period plays would further identify this era.

Adaptive re-use of Lindsay Mills built in the late 1860's would provide residents and visitors to Lindsay with a much needed upscale dining place. Development of the building as a themed restaurant and hotel would complement the heritage of Lindsay while increasing the use of the waterfront area. It is recommended that the hotel be patterned after the Benmiller Inn and Millcroft Inn providing approximately 40 guest rooms, and a dining room with capacity for approximately 125 persons. Located near the hotel should be a marina containing slips for at least 75 boats, including sailing craft and power cruisers. Available services would include water, electricity, fuel, pump-out, repairs, boat launching gear,

ramps and fishing supplies. The primary orientation for the marina would be seasonal boaters with less than 25% of the berths recommended for transient boaters. Adjacent to the marina and linked to the restaurant/hotel and marina by a riverside boardwalk would be Wilson Municipal Recreational Park. The park should include a creative play area, an outdoor pool, roller rink/ice skating rink and vita parcour. Landscaping would delineate the active and passive activity areas.

The marina would be the centre for the proposed boat tours and steamer cruises between Lindsay, Burleigh Falls and Bobcaygeon. It is expected that a high percentage of the cruise participants staying overnight in Lindsay would choose to stay at the Lindsay Mill Hotel. A steam train linking the area with Fenelon Falls is recommended as a reminder of Lindsay's role during the early railway era. Period entertainment would be provided aboard the train by musicians and a sing-a-long barber shop quartet.

Burleigh Falls Area Development Strategy

Burleigh Falls was one of the first resort areas to be developed in Ontario, and has continued to be an attractive centre for canoeists, boaters, fishermen, hikers and snowmobilers. Land and water based outdoor recreation in a scenic natural environment forms the predominant theme for tourism development in this node. The strategy is to expand and upgrade the attractions and accommodation in order to increase day-use and overnight stay potential, particularly during the summer and shoulder seasons.

The Burleigh Falls area is not considered a high opportunity area for increased winter activity. It is, however, seen as a launching and stop-over point for those using the hiking, canoeing, cross-country skiing and snowmobiling trails to explore the surrounding area.

The development strategies recommended are designed primarily to retain the visitor in the immediate Burleigh Falls area for longer day-use

visits; encourage overnight stops and retain those already committed to an overnight stay. Among the day-use facilities recommended are: picnic areas, a boat launch, an outfitting centre providing fishing equipment, canoes, sailboats and sailing equipment. Below the locks would be a second canoe rental outlet and sailboating centre. Rock outcrops in the channel downstream from the Burleigh Falls dam afford the opportunity for whitewater kyaking. While not of sufficient size to attract national or international markets, they would appeal to provincial, regional and local whitewater enthusiasts. To provide links between the whitewater area, roadside picnic park, fish viewing, boat launching and rental areas and the locks, a walking trail should be developed. This same trail would link the recommended activity centres above and below the locks.

A campground development on Stoney Lake, near Burleigh Falls would cater to auto and boater traffic. Operating primarily as a full service resort facility, the 180-site property should also provide spaces for boaters and campers wishing to stay on a short term basis.

To accommodate the tour boats scheduled to stop at Burleigh Falls it is recommended that the food and beverage establishments be upgraded and possibly expanded.

Bancroft Area Development Strategy

The development strategy for Bancroft aims at expanding the attractions and services of interest to mineral collectors and outdoor recreation enthusiasts on a year-round basis. Mining and lumbering as development sub-themes are commensurate with the predominant accessible wilderness theme.

A mineral park which allows visitors to observe and participate in mineral collecting, combined with a boat tour to convey people to and from the park, are recommended as means of expanding the area's reputation as a mineral collection centre beyond the period of the annual Gemboree festival. A rockhound guiding service and mineral display

centre are two other attractions meant to enhance the tourist experience in Bancroft.

Improved tourist services such as a year-round (rather than summer only) information centre and an interpretive centre will hold visitors in the area for longer periods of time and entice repeat visits. The area's lumbering heritage can be interpreted through a themed streetscape and scenic walk along the York River. A riverside cafe and outdoor arts and crafts market featuring local artisan's work will provide opportunities for focussing tourism development on the river.

The creation of new canoe routes will increase penetration of the surrounding area during summer. The development of a hut-to-hut cross-country skiing operation between the Apsley and Silent Lake trail systems will complement the existing Kawartha Ski Tour while providing a ski marathon of relatively greater distance and variety. Day trips using a mini-bus are suggested as a means of linking river rafting opportunities on the Madawaska River, downhill skiing at Mt. Madawaska and tours of the Harcourt Lumber Mill and the Madawaska Mine.

Bobcaygeon Area Development Strategy

The development strategy for Bobcaygeon is to encourage both day-use and overnight visitation on a year round basis. The area is centrally located in terms of access to major urban centres and the waterway. The aesthetic appeal of the area and its historical and natural resources are the primary tourism generators. The development intent is to capitalize on the existing historical base and to develop complementary attractions and facilities throughout the town.

The provision of quality accommodation will be a key requisite in encouraging day-use visitors to remain overnight. While the accommodation stock in Bobcaygeon is generally outdated, its location is excellent. To provide a more diverse and higher quality product an

adaptive re-use is suggested for an existing property and a newly constructed destination resort is recommended on Pigeon Lake.

It is recommended that the original house of the Bobcaygeon Inn be retained and renovated and that a low rise structure containing approximately 30 guest rooms be combined with a motel-type wing containing approximately 15 units. The proposed structure should be easily accessible to boaters for both overnight and day-use activities, while also providing the appropriate amenities to attract the bus tour and conference market. In winter, special packages could be offered for snowmobilers. This property will be in an excellent position to serve the tour boat and paddle-boat passengers remaining overnight as part of the Trent-Severn Waterway tour.

The destination resort recommended for Pigeon Lake should consist of a 50 room lodge and several semi-detached deluxe housekeeping cottages. Included in the full complement of recreation facilities are tennis courts, indoor pool, sauna, whirlpool, sailboats, windsurfers and cross-country ski trails. A houseboat rental outlet would be attractive to the European market.

The many century buildings in Bobcaygeon provide an excellent day-use development opportunity. A self-interpretive walking tour would originate from the tourist information centre. A themed streetscape based on the lumbering era is proposed for the main street. To complement the heritage-oriented activities, the fair grounds should be utilized for a lumberjack festival, farmers market and winter carnival. In recognition of the popularity of snowmobiling in the area, a major snowmobile rally should be developed using nearby trails. The rally could be the focal point of the winter carnival.

Fenelon Falls Area Development Strategy

With the decline in importance of lumbering on the Trent-Severn Waterway, Fenelon Falls became known as a service centre for cottagers and

recreational boaters. It still retains that reputation today. The development strategy for the Fenelon Falls area, therefore, is to increase day-use visitation for the full year by diversifying the summer attractions and increasing the range of attractions and quality of services during the off-peak season. The recommended development opportunities complement the existing facilities and resources by conserving the natural resource base and preserving the community's history. Outdoor recreation related to the nationally significant waterway forms the major theme for the Fenelon Falls area. Sub-themes incorporate the lumbering, milling and steam navigation eras.

Fenelon Falls is recommended as one of the scheduled stops on the Trent-Severn boat tour proposed for the study area. Passengers embarking from Kirkfield will be in Fenelon Falls in time for lunch. A walking tour of the town, view of the falls and shopping are possible activities to be associated with this stop. To complement the boat tour, a steam train operating between Lindsay and Fenelon Falls would provide passengers with a scenic and exciting method of travelling between the two centres. The steam train stop would allow passengers to disembark, view the lock and the falls, walk around the historic buildings or browse through the village. They could then return to Lindsay either by train or by tour boat.

Quality food and beverage services in a themed facility should encourage a longer stay for all day-use visitors, including local cottagers and campers. A restaurant located south of the Fenelon River and overlooking the falls could capitalize on the old foundation and forebay of a nineteenth century sawmill. A picnic park developed near the northern edge of the gorge would afford an excellent view of the falls, the lock, the gorge itself and boating activity below. A self guided nature walk would link the picnic park, boat docking area, tour boat stop, the lock and the central business districts. Signage in the Central Business District would identify the walking tour of historic buildings. Self-interpretive signs would be erected depicting a brief historical sketch of each site. Included would be a number of the older stores on

Oak and Colborne Streets as well as Maryboro Lodge, Blyth House and the Anglican Church. Other period buildings could be upgraded to present a streetscape reminiscent of the lumbering and milling eras.

Hastings Development Strategy

Hastings is in an excellent location to act as a day-trip destination, a local service centre to seasonal and year-round markets and stop-off or meeting point for auto and boater traffic. Increasing day-use visitation throughout the year forms the basis of the development strategy for Hastings. To attract the boater market, the strategy focuses on providing sufficient recreational activities to encourage users of the waterway to lengthen their day visits in Hastings. Many of the nineteenth century industrial, commercial and residential buildings in the area remain intact, thereby providing Hastings with a natural development theme.

Few quality food and beverage facilities are available within the Hastings area and no particular urban centre attracts the food and beverage market. A restaurant and entertainment facility developed in the old mill would provide Hastings with the potential to capture a significant share of the regional food and beverage market. Located on the water, this facility would cater to both the auto and boater markets. In concert with this development, a large island adjacent to the old mill site should be developed as an integrated recreational area to serve both these markets. To accentuate Hastings's relationship with the waterway, a bass derby is suggested which would stress the live release of fish.

Further complementing the waterway-orientation is the proposed Rice Lake boat tour which includes Hastings as a scheduled luncheon stop. Of interest to tour boat passengers, recreational boaters and auto tourists is the recommended scenic and naturalist boat tour from Hastings to Rice Lake. Significant points of interest will include Serpent Mounds, the wild rice beds and the wildlife production areas throughout the lake.

Gamebridge Area Development Strategy

Situated at the crossroads of two transportation corridors, Gamebridge is ideally suited as a western gateway to the Peterborough-Haliburton Tourism Zone. The objective of the development strategy for Gamebridge is the increase of day-use tourism on a year-round basis and the encouragement of a longer stay in the zone. The intent of the proposed development opportunities is to increase the range of facilities and services available to the day-use visitor and to provide attractions, facilities and services which create an awareness of the entire development zone. The predominant development theme is the environment and historical/cultural landscape appreciation.

An essential ingredient for this development node will be a year-round visitor information centre. A replica of an old lockmaster's home could house a themed restaurant portraying the development history of the Trent-Severn Waterway. A co-operative native craft centre will create an awareness of the role played by the native people in the development of the area and allow special craft displays while providing an outlet for local artisan's work. Awareness will also be created for other native craft displays in the zone such as the Whetung Indian Craft Centre at Curve Lake and Hiawatha Indian Craft Centre on Rice Lake.

As a means of encouraging visitors to explore the area other than by auto or boat, a bicycle rental concession is recommended for this node. The Kirkfield Lift Locks, MacKenzie House and Balsam Lake Provincial Park are all within the day-use range of the node. A hiking trail is suggested along the Trent-Severn system from the Lake Simcoe shoreline to the Middle Gamebridge Lock. The hiking trail would introduce the flora and fauna indigenous to the area. During the winter the trail could serve cross-country skiers.

Rosedale Development Strategy

The development strategy for Rosedale is to increase day-use visitation

by emphasizing the attractiveness of the area's natural resources and wildlife activity. Rosedale is not considered as having good winter tourism potential. The recommended development concentrates on capturing a larger share of summer and shoulder season visitation.

The identified development opportunities have been designed to respect the integrity of the environmentally sensitive habitat and wildlife present in the area. Commercial development has been limited to only the basic tourism requirements in order to preserve the natural resource base.

Interpretive opportunities associated with the natural environment and canal technology form the basic draws of this node. A significant water fowl area exists at Rosedale. It should be linked to the lock area by a nature trail and boardwalk. A self-guided walking tour to the Rosedale dam and the old locks should explain canal technology and its influence on the surrounding environment.

Trent-Severn Touring Corridor Development Strategy

In an attempt to reduce boating pressure on the Trent-Severn Waterway system and yet expose visitors to as broad a spectrum of its resources as possible, a variety of boat tours are recommended. Some of these tours are supplemented by rail and bus transportation. All six of the recommended tours make use of the available or proposed accommodation and food and beverage service facilities along the waterway and focus on the myriad of cultural and heritage attractions found within the Trent-Severn corridor. The proposed tours involve all combinations of boat, rail and bus travel and vary from single day excursions to one, two and three night stop-overs.

Tour I begins in Kirkfield and involves stops at Fenelon Falls, Bobcaygeon, Burleigh Falls and Lindsay. Overnight stops are scheduled for Bobcaygeon and Lindsay. The Kirkfield to Lindsay portion of the trip would be aboard a replica of an early Canadian paddle boat such as the

"Esturion". The return leg of the trip from Lindsay to Kirkfield would be by bus. Tour II begins in Lindsay and proceeds to Fenelon Falls by steam train, goes on to Kirkfield by tour boat and returns via Jackson's Point by bus. An overnight stop is proposed for Jackson's Point. The third tour is a scheduled return trip between Lindsay and Fenelon Falls by steam train. Tour IV which commences in Lindsay and proceeds to Peterborough by tour boat involves three overnight stops; Bobcaygeon, Lakefield and Peterborough. A short lunch stop allows passengers to disembark at Burleigh Falls. A bus tour would return the passengers from Peterborough to Lindsay. The fifth recommended tour mirrors trip IV but begins in Peterborough and proceeds to Lindsay with a return bus trip to Peterborough. The final recommended tour, will be aboard a tour boat from Peterborough to Hastings. On the return portion an overnight stop is planned at a Rice Lake resort with excursions by bus to Serpent Mounds and the Hiawatha Craft Centre.

In summary, the implementation of this tourism development strategy requires direct action on the part of both the public and private sectors. In broad terms, the public sector must encourage and vigorously support private tourism projects in order for the industry to prosper. This can be accomplished through strategically designed programmes of research, information distribution, training/education, marketing, promotion, technical and financial assistance and, in some cases, infrastructure and attraction development. The private sector should continue to be the primary motivator for implementing the development opportunities.

This report presents a comprehensive tourism development strategy for the Peterborough-Haliburton Zone. The approach recommended in this strategy is designed to provide a broad variety of diverse tourism experiences for the local, regional, provincial, national and international markets while respecting the integrity of local communities and preserving the natural, environmental, social and economic resources of the area.

SECTION I
INTRODUCTION

FOREWORD

In December of 1975, the Ontario Ministry of Industry and Tourism commissioned a study to provide a Provincial overview of tourism development in the Province of Ontario for the next five to ten years. The resulting document, entitled Tourism Development In Ontario: A Framework for Opportunity, identified 17 tourism development zones. It provided an initial guideline for tourism investment with particular emphasis on opportunities for the private commercial sector. Since the publication of that report several more detailed zonal studies have been undertaken which provide development guidelines for both the private and public sectors of the tourism industry.

In October 1980, Laventhol & Horwath was commissioned to conduct a study designed to produce a comprehensive tourism development strategy for the Peterborough-Haliburton zone. The strategy outlined in this report reflects the guidelines and planning principles recommended in Tourism Development In Ontario: A Framework For Opportunity. However, this report also incorporates unique planning, development and marketing strategies tailored specifically to the zone's distinctive issues and character.

STUDY OBJECTIVES

This report describes a tourism development strategy for the Peterborough-Haliburton Tourism Zone. Its purpose is to identify specific tourism development investment opportunities of primary interest to the private sector. The report examines the zone's tourism/leisure potential and details a strategy whereby such potential may be maximized. The strategy provides a framework for guiding private investors and the public sector

toward those forms of tourism development which are financially realistic in today's marketplace and which will benefit the region's and Ontario's tourism industry to the greatest extent.

This document is not intended to represent existing or future government policy with respect to tourism. While roles and responsibilities for both the public and private sector are suggested in this strategy, the main thrust of the document is to identify an integrated and co-ordinated system of tourism development opportunities primarily for private sector consideration, investment and operation.

Numerous development projects are identified in the report. However, the specifics of implementing these strategies as well as any others which may arise would be subject to negotiations between the public and private sector, in addition to the impact of prevailing social, economic and market conditions. This report should be regarded as a general guide to tourism development rather than a specific blueprint dictating individual action.

Tourism Issues and Strategy Context

Although the responsibility for implementing this strategy lies principally with the private sector, their actions in this regard must not occur in a vacuum. Unlike most industries, the resources of the tourism industry (e.g. forests and waterways), production units (e.g. hotels and art galleries), and customers (e.g. skiers and tour groups) are not only diverse and geographically diffuse, but they are frequently shared with other industrial sectors. As such, the industry must relate in a positive and concerted fashion to the broader interest of the zone's community if it is to achieve the objectives of the strategy.

Several issues bear heavily on the future growth and success of tourism development within this zone. These issues relate to broad planning, management and marketing concerns. Planning issues which have surfaced

frequently during the preparation of this strategy are concerned with natural, economic and social environments within and outside the zone. Waterways, wilderness, beach areas and fishing resources represent the traditional tourism travel generators for the zone. Timber harvesting practices, resource preservation philosophies, lake eutrophication, milfoil growth, sport fishery capacity and acid rain all represent inhibitors of tourism development. These are issues which are directly affecting the industry now and will continue to do so unless they are acted upon immediately by both the public and private sectors.

Regional income, land values, local government revenues and expenditures, the strain of peak use periods, the geographic distribution of growth patterns, as well as the preservation of cultural heritage are all tourism-related issues of concern to communities and entrepreneurs within the zone. These planning issues must be addressed objectively if tourism development is to prosper in the future.

Tourism management issues reflect the character of the area's human, physical and financial resources. They must be effectively combined. The development of a qualified and creative labour force, the use of an environmentally sensitive resource base and the limited availability of capital for investment make the management of tourism within this zone a challenging task. However, these realities must be addressed by the industry in a positive and creative manner if growth is to occur. To date, the industry (private as well as public sector) has not aggressively dealt with these issues.

Marketing, with its focus on identification of markets, product planning, and communication, is another area confronted with several problems and opportunities. Inflation, rising energy costs, fluctuating exchange rates, and competition all pose uncertainties for growth within the zone. Developing travel product alternatives and target market advertising based on appropriately identified market segments and implementing focussed and regionally co-ordinated promotion programmes, are all

crucial and difficult tasks requiring integration. Using the most effective marketing communication network possible to inform travellers of the variety of opportunities available to them at both individual locations and combined locations within the zone is a priority for the industry at large. To gain a competitive edge in tomorrow's tourism market will require a co-operative effort on the part of the private sector and government alike. Consensus within the industry will be required on how to deal with each of these marketing issues. This agreement currently does not exist.

In short, the industry must develop plans and programmes for confronting and dealing with each of these issues. The strategy identified in this report suggests the forms of development which should ideally occur if these issues can be resolved satisfactorily by the entire industry.

REPORT ORGANIZATION

The study results are presented in two volumes. Volume 1 provides a summary assessment of the zone's resources, tourism plant, infrastructure and current and potential markets. It also describes in detail a tourism development strategy designed to match the area's capability. Volume 2 provides additional background information of particular value to public and private sector groups undertaking a more detailed analysis of specific development opportunities identified for the zone. Together, the two volumes provide a guide to suitable tourism investments within the zone.

REGIONAL CONTEXT

Study Area Delineation

While the study zone was identified in general terms in the report Tourism Development in Ontario: A Framework for Opportunity, no specific administrative boundaries were established. Based on consultation with

the Ontario Ministry of Industry and Tourism, as well as the recognized need for efficiency in collecting pertinent background information, the following areas were included in the analysis:

- The entire counties of Peterborough, Haliburton, and Victoria;
- Rama and Mara Townships in Simcoe County;
- Georgina Township in the Regional Municipality of York;
- The area of Brock Township north of Vallentyne and Sunderland in the Regional Municipality of Durham;
- Faraday, Monteagle, Herschel, Bangor, McClure and Wicklow Townships in Hastings County;
- Burns, Jones, Sherwood and Radcliffe Townships in Renfrew County;
- The area south of Highway 60 in Algonquin Park.

Located within easy travelling distance of the most highly urbanized part of Ontario, the study zone is strategically situated with respect to its major markets. Day-use tourism from beyond the zone can be drawn from urban centres as distant as Oshawa and Belleville. Metropolitan Toronto lies within easy access of the southern portions of the zone for weekend and/or short-term vacations. The zone is also easily accessible for vacationers from Hamilton, Southern and Eastern Ontario and New York State.

Access to the zone is primarily based upon a convenient highway network. North-south access is facilitated by a number of well-developed two-lane highways (e.g. Highways 48, 35/115, 28). East-west access is provided by Highways 60, 121, 36 and 7. An extensive system of county and township

roads supplements these major arteries by providing the transportation infrastructure upon which tourism development opportunities for the area greatly depend.

While numerous attractions exist within the study zone, the area is surrounded by many equally significant tourism attractions (Map 1). These travel generators include National and Provincial Parks, historic sites, cultural festivals, special events and theme parks.

In some instances, these attractions represent competing attractions, or intervening opportunities for the zone's tourist industry. In other instances, they represent complementary opportunities capable of drawing more tourists to the study area. Tourism development should capitalize on the range of attractions surrounding the study area. It should use these travel generators as a means of leading the tourist to the zone.

REGIONAL ECONOMIC SITUATION

Over the past two decades, the characteristics of economic activity within the study area have been subject to considerable change. In addition, these shifts all point to a larger and more significant role for tourism. This situation is well illustrated by the performance characteristics of the labour force in terms of income and the more significant economic sectors found within the zone.

Labour Force Income

A prime indicator of this zone's past economic performance is the earning capacity of its population. It reflects the efficiency of the allocation of the region's productive resources. While the study area lies adjacent to Central Ontario (Ontario's most affluent region), its income earners in 1976 produced an average annual household income (\$17,056) which was well below the average (\$20,681) for Ontario.¹ Considerable disparity

Tourism Development Strategy

Map 1 Study Zone and Regional Setting



LAVENTHOL & HORWATH
MANAGEMENT CONSULTANTS



in these figures exists within the zone. For instance, per capita income averages range from 86% of the Provincial average in Peterborough County, to 62% in Haliburton County. Not only does the zone not benefit from public service salary scales or from large scale unionization, but female participation in the labour force (39%) as a means of providing second income lags behind the Provincial average (44%). Unemployment (7%) is also above the Ontario average (6%).²

Agriculture

Despite a relatively stable contribution to the zone's labour force (approximately 5%)³, commercial agriculture is highly marginal in nature. It is characterized by a limited variety of crops, a heavy dependence upon livestock production, abandonment in marginal farmland areas, urban encroachment in many agriculturally productive zones, a preponderance of low-income farms, and a growth in the number of farm operators who must supplement their income with other forms of gainful employment. Substantial structural changes in the industry will have to occur if the industry is to continue to contribute significantly to the area's economic base. These changes will require fewer but larger farms, increased mechanization, more intensive and specialized land-use and increased management skills.

Despite these barriers to growth, encouraging prospects for this sector from a tourism development perspective exist. These include modest increases (5% since 1972) in land under crop in Victoria County,⁴ as well as potential opportunities for expanded maple syrup production in Haliburton County.

Fresh, locally produced agricultural products represent an attractive draw for tourist-oriented eating establishments. Through closer linkages with these producers, the tourism industry could play a significant role in generating the consumer demand necessary for continued production in the zone.

Similarly, government estimates suggest that close to 20% of Ontario's maple syrup production could be produced in Haliburton County provided that well organized marketing and promotional strategies are developed.⁵ Several tourism events (e.g. festivals) and attractions (e.g. sugar bush tours) could be developed to capitalize on the uniqueness of this activity. The seasonal character of this agricultural activity would also serve to draw traffic to the area during a normally off-peak time of the year. The traffic generated by tourism would, in turn, provide a further stabilizing influence upon markets for this product. By itself, however, the market would not be of sufficient size to warrant extensive promotion.

Forestry

Forestry is a small contributor to the employment base within the study zone. However, its impact has been considerably more apparent (2.2% of the labour force) in the northern areas where the forest cover is more prevalent.⁶

In recent years, despite the presence of forest-covered lands, the industry has experienced an overall decline in contribution to the employment base of the zone. Furthermore, little improvement in the situation is expected over the next 20 to 30 years because of a shortage of quality hardwood. In brief, the forest industry as it currently exists is not likely to generate economic growth in the immediate future. Keys to growth over the next 20 years appear to include the creation of more efficient large-scale processing plants, the establishment of concentrations of interrelated forest-based manufacturing in a few strategically located centres and the availability of the financial assistance required to capitalize on new opportunities. Potential opportunities include increased utilization of low quality timber for bolt milling and firewood.

From a tourism development perspective, other legitimate uses of the extensive forest resources found within this zone should be considered. Forest recreation opportunities represent strong pulls for tourism travel.

Mining

The mining industry is a small and highly volatile contributor to the zone's economic base. During the last decade, it has never accounted for more than 1% of the total employment of the area and has actually been less than 0.5% in most years.⁷

Significant opportunity does exist, however, for the development of this industry as the zone has moderate to high mineral potential. With positive changes in current international and national economic and market conditions, the revenue contribution of this sector to the zone's economy will increase.

With these changes, tourism development opportunities associated with this industry should also improve. Complementary enterprises using industrial mining tours, rockhounding, mineral viewing, rock formations and gem exchanges as themes can all provide a further tourism input to the zone's economic base.

Manufacturing

While approximately 26% of the zone's labour force is employed in some form of manufacturing activity, only moderate employment growth has occurred during the last decade and it has been concentrated at strategic locations such as Peterborough and Lindsay.⁸ Very little occurs beyond these urban centres. The major exception to this situation is found in Haliburton County where most manufacturing activity is directly related to the wood-based industries.

In most cases, actual employment growth is constrained by the lack of new plant formations and/or expansions. The manufacturing which does occur within the zone is very diversified. There are generally few business interrelationships among the firms. Most plants have closer ties with national and international business than they do with other local manufacturers.

Because of the diversified nature of manufacturing within the zone, it is difficult to characterize prospects for this sector's future in general terms. However, it would appear that little more than moderate growth can be expected for this sector in the next ten years. Neither the long established manufacturing industries within the zone nor the limited development of new plants can be depended on for the steady supply of new jobs required for an expanding labour force (5% to 10% per annum).

This situation calls for the creation of new facilities, product lines and market areas. If the manufacturing sector cannot completely fulfill this need, tertiary industries and, more specifically, tourism-related enterprises should be considered as an economic vehicle for filling this void.

Service Sector

Throughout this zone, the employment base has evolved from a strong dependence on manufacturing and primary activities to a reliance on the service sector. Tertiary activity comprises more than 61% of the employment base in this zone. Geographically, it varies from 72% in Haliburton County to 60% in Victoria County. The Ontario Provincial average is 63%.⁹

Service sector growth has created a diversified set of job opportunities for both clerical and professional persons. Over a third of service sector employment is in community, business and personal service

positions. In Haliburton County, accommodation and foodservice jobs comprise about 45% of the service sector employment base.¹⁰ While employment in this sector has experienced strong growth patterns in the past few years, it is felt that this tertiary group will experience only marginal growth in the near future. Opportunities associated with tertiary sector recreation/tourism development do, however, appear promising.

Tourism/Recreation

Given the zone's close proximity to the Toronto-based recreation and travel market as well as the attractive natural setting of the area, tourism is a potentially strong contributor to the area's economic base. Figures available from the Ministry of Industry and Tourism for 1976 indicate that tourism expenditure in the area amounted to approximately \$240 million.¹¹

Cottaging, camping and commercial roofed accommodation developments have traditionally created economic spin-offs for the study area. They have not only stimulated economic growth in the tourism sector but have also created expansion for the building trades, building material suppliers, maintenance and improvement contractors, real estate developers and local retailing operations.

Optimism for continued growth in tourism has been fuelled by favourable dollar exchange rates which should attract Americans and other foreign travellers; greater domestic travel closer to home; and an increased appreciation of domestic year-round leisure opportunities by Canadians.

Despite promising potential for new investment and employment, this sector has not reached expected levels of performance in the recent past. Tourism flows to the zone have been, at best, only stable. The area has evidenced very little new investment in resort and hotel accommodation and the growth of the seasonal home industry has slowed.

The current position of the industry is related to the deterioration of some of the facilities as a consequence of insubstantial new capital investment, the need for more aggressive promotion, packaging and lengthening of the season. The industry is in need of revitalization and there is certainly room for new tourism development by both the private and public sectors.

Conclusions

Based on our analysis, it would appear that the recreation and tourism industry is one of the strongest contributors to the zone's economy and has the potential to become the most important. The central theme to the future development of this industry is not unlike that for all the other sectors previously discussed. Substantial expenditures of time, effort, and capital are necessary. Tourism is particularly in need of an upgrading of existing facilities and an expansion of the current range of activities available to tourists.

Tourism's role in stimulating the study zone's economy could be significantly increased through:

- Conducting more market-oriented research which will allow private entrepreneurs, municipalities and travel and tourist associations to keep abreast of changing trends in the travel market. Because the lack of data creates a lack of awareness, there is a tendency to promote traditional markets and to rely on traditional and cost ineffective promotional methods.
- More co-ordinated promotion of the zone by private entrepreneurs, municipalities, travel and tourism associations and senior levels of government. In general, there is a parochial attitude toward tourism which has led to locally and regionally-oriented development and promotion.

- Focussing promotion on specialty markets for the study zone.
- Placing more emphasis on the promotion of package tours and vacation experiences unique to the zone.
- Encouraging developments which extend the tourist season into the shoulder or off-peak seasons and reduce the reliance on a seasonal market.
- Upgrading, expanding and diversifying the existing tourist plant; in particular roofed accommodation, restaurant and dining facilities and full service marinas.
- Encouraging developments which draw on the natural resource capabilities of the study zone, e.g. the nationally significant Trent-Severn Waterway in the south and "accessible wilderness" in the north.

ENDNOTES

1. Statistics Canada, Income Breakdowns (1976 Estimates).
2. Statistics Canada, Labour Force Characteristics, 1976.
3. Agricultural Statistics of Ontario, Ontario Ministry of Agriculture and Food, 1974.
4. Ibid.
5. Haliburton Economic Development Study, Economic Development Branch, Ministry of Treasury and Economics, 1979.
6. Ibid.
7. Statistics Canada, Catalogue #94-744, 1976.
8. Municipal Profiles, Ontario Ministry of Industry and Tourism, 1979.
9. Statistics Canada, Catalogue #94-744, 1976.
10. Ibid.
11. The Economic Impact of Tourism in Ontario and Regions 1976, Ontario Ministry of Industry and Tourism.

SECTION II
RESOURCE AND INFRASTRUCTURE ANALYSIS

INTRODUCTION

The physical resources of an area as well as the facilities, attractions and services in large part determine that area's ability to accept and sustain tourism. In the following pages, the physical resources, facilities, attractions and services of the study zone are examined and assessed from a tourism perspective.

Relative to the other Southern Ontario development zones identified in Tourism Development in Ontario: A Framework for Opportunity, the Peterborough-Haliburton zone depends more on its natural resource base for tourism development potential. For this reason, the natural resources, attractions and services were evaluated within the context of distinct physiographic regions.

PHYSIOGRAPHIC LANDSCAPE UNITS

Tourism development is dependent upon the "magnetism" of its resource base. The natural, physical, historical, cultural, archaeological and man-made resources of the study zone have a significant impact in determining what the area has to sell - or what needs to be done to develop saleability.

Physiographic Zonation/Landscape Units

To clarify the potential of the distinct sectors within the zone, and to facilitate a detailed assessment of its tourism base, the study zone has been divided into relatively homogeneous landscape units. These landscape areas are essentially subdivisions of those physiographic units outlined by Chapman and Putnam in The Physiography of Southern Ontario. Each unit displays a distinct physical resource base which is normally

different from that of all other units. Each unit contains soil, drainage, vegetation, shape and relief characteristics which favour certain types of recreation/tourism development.

Two major physiographic regions exist within the study zone. The southern third of the zone is referred to as the Paleozoic physiographic region and is comprised of largely limestone sediments. These relatively softer rocks are covered with a complex array of glacial and post-glacial sediments, giving rise to a wide array of diverse landscape units. The northern two-thirds of the zone is the Precambrian physiographic region. This area, which is composed of granite-gneisses and sediments, presents a more uniform unit characterized by a lack of overburden.

In total, 19 landscape units within these two major physiographic units have been identified. Although the distributional patterns of geology, relief and surficial sediments are not simple, it is possible to generalize them into landscape units. The geographic locations of these landscape units are shown in Map 2 and the units are described in detail in Volume 2 - Section II of this report.

EVALUATION APPROACH

The specific resources and facilities contained within each landscape unit have been evaluated on the basis of the following criteria and given a relative rating of low (1), medium (2) and high (3). The following is an outline of the factors used to evaluate the resources and facilities. Tables 2.1 and 2.2 provide a summary of the evaluations.

<u>Resource/Facility</u>	<u>Evaluation Criteria</u>
Physical Resources	● visual contrast; topographic, geomorphological and ecological diversity; significance of wetland and hydrologic features

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Map 2 Physiographic Regions and Landscape Units

Source

Physiographic regions adapted from Chapman, L. J. and Pulliam, D. V. 1986. The Physiography of Southern Ontario, 2nd ed. University of Toronto Press



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<u>Resource/Facility</u>	<u>Evaluation Criteria</u>
Fish and Wildlife Resources	<ul style="list-style-type: none">● capability, diversity, access, environmental durability
Sensitive Environmental Areas	<ul style="list-style-type: none">● durability, ecological significance, significance of spawning and nesting areas
Historical and Archaeological Resources	<ul style="list-style-type: none">● quality, significance, diversity, abundance
Outdoor Recreation Capability	<ul style="list-style-type: none">● degree of suitability of landscape for extensive and intensive recreational activities
Climate	<ul style="list-style-type: none">● suitability for summer and winter outdoor recreation, based on season length, temperature, humidity and precipitation levels
Commercial Roofed Accommodation	<ul style="list-style-type: none">● size, variety of types (i.e. resort, motel, hotel, commercial cottage), number of facilities, quality of units
Food and Beverage Establishments	<ul style="list-style-type: none">● number of establishments, variety of type (i.e. fast food, table service, licenced)

<u>Resource/Facility</u>	<u>Evaluation Criteria</u>
Transient and Seasonal Campgrounds	● number of sites, mix of seasonal and transient sites, range of facilities and services
Outdoor Recreation Facilities	● variety, abundance, quality
Events and Attractions	● status, seasonality, variety, abundance
Transportation	● access orientation and variety of mode

RESOURCE EVALUATION

Physical Resource Base

The landscape units with the greatest physical resource value are those exhibiting the greatest visual contrast, landscape relief, forest cover and diversity of hydrologic features. To a lesser extent, although still key determinants of the landscape unit's capability and potential for tourism development, are its geologic and glacial features and ecological diversity.

In general, those units on the Precambrian Shield or proximate to the Lake Simcoe, Lake Scugog or Rice Lake shorelines are endowed with the best combination of all these features.

The Haliburton Lakelands, Algonquin Highlands, Chandos Lakelands and Bark Lake units present the most appealing scenic viewing perspectives. A very different appeal is generated by the abundant glacial features in the Rice Lake and Dummer Moraine units. Water bodies providing the focus

for water-oriented tourism development characterize most of the landscape units within the zone; exceptions include the Mara Drumlin Field, Scugog Clay Plain and West Carden Plain. Significant wildlife habitats, avian nesting and staging areas and fish spawning locations necessary for many wildlife-oriented tourism pursuits are found in the Mariposa, Ennismore, Rice Lake, Chandos Lakelands and Algonquin Highlands landscape units.

Fish and Wildlife Resources

Terrestrial Wildlife

Wildlife resources constitute a significant component of the attraction base for tourism-related development. The diversity and abundance of wildlife in the study zone serves as a magnet drawing tourists to the area during the entire year. The habitat capability for wildlife on the shield is generally moderate to low, with small areas of capability found in parts of Cavendish and East Carden Plain units. Terrestrial species dominating the shield area include deer, moose, black bear, grouse, beaver and other small fur bearers. Deer and small game such as racoons, foxes and rabbits are predominant among the species found in the southern Paleozoic landscape units.

Avian Wildlife

The wetlands, south of the Precambrian Shield, represent some of the most biologically productive habitat in Ontario. Especially important locations for waterfowl supply are the Osler Marsh on Lake Scugog in Scugog Unit, the south end of Pigeon Lake in Ennismore Unit, Pigeon Creek and the marshes on Rice Lake in Rice Lake Unit.

Woodland wildlife such as ruffed grouse are plentiful in the forested stream valleys throughout the study area. In the Paleozoic section of the study area, they are concentrated in the north-western landscape units where the forest cover particularly suits their habitat requirements.

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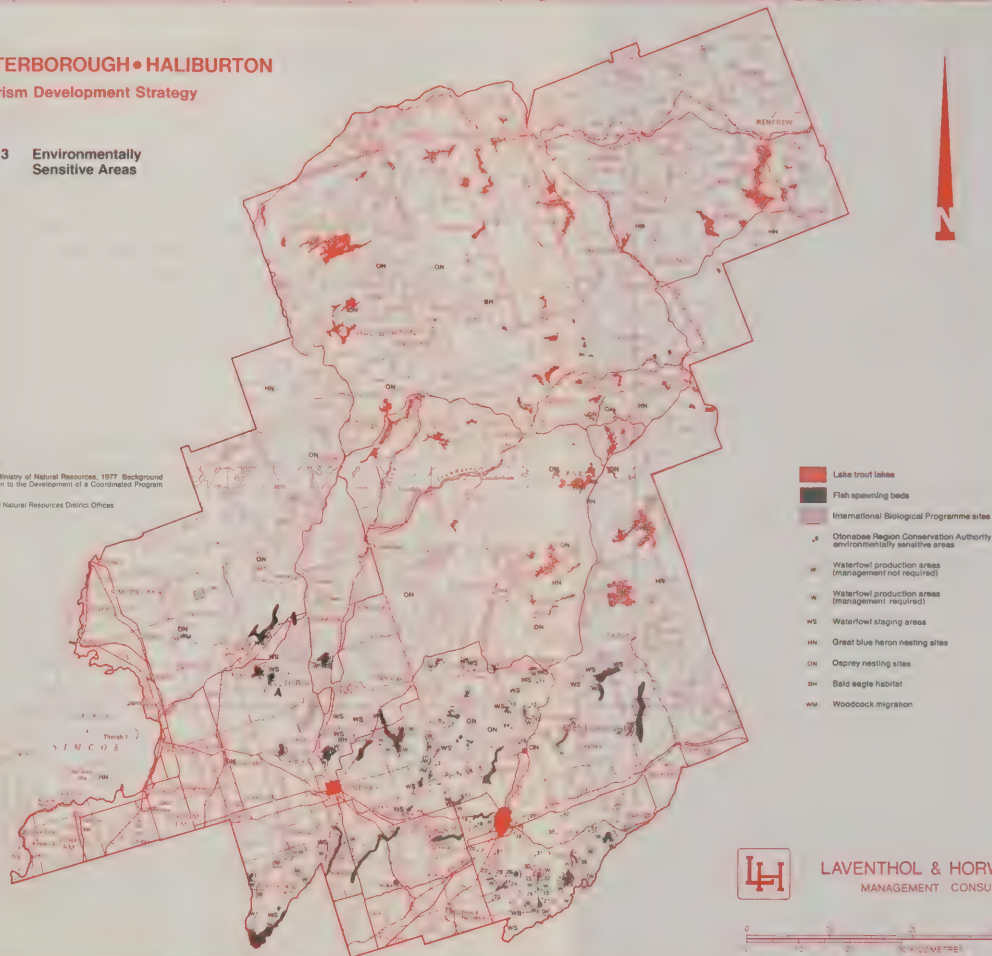
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Map 3 Environmentally Sensitive Areas

Sources:

Ontario, Ministry of Natural Resources, 1977: Background information to the Development of a Coordinated Program Strategy

Ministry of Natural Resources District Offices



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Woodland wildlife are evenly distributed in the Precambrian landscape units.

Aquatic Wildlife

A wide variety of cold and warm water fish species is available within the study area and they vary significantly in their distribution. Lake trout is the most popular species in the central and north-eastern sections of the study area, particularly in the Haliburton Lakelands landscape unit. The warm water species such as yellow pickerel, muskion and bass are largely concentrated and sought after in the Kawartha Lakes, located in Ennismore, Mariposa and Dummer Moraine landscape units.

Sensitive Environmental Areas

Wildlife-associated tourism development requires the protection of those areas necessary for the continued regeneration and maintenance of the species. Future tourism development must recognize the need to protect such areas from unnecessary disruption. Those areas identified as environmentally critical areas are presented on Map 3.

Lake trout lakes within the study area sensitive to development are concentrated in the Haliburton Lakelands, Bark Lake and Algonquin Highlands landscape units. Significant marshes, swamps and forests designated by the Ontario Government in co-ordination with the International Biological Programme are concentrated in the Chandos Lakelands, Rice Lake, Scugog and Dummer Moraine landscape units. Significant waterfowl breeding and staging areas include the wetlands and weedy bays found in the Mariposa, Ennismore and Rice Lake landscape units.

Sports fishing plays an important role in the zone's tourist industry particularly in the Kawartha Lakes area. Fish spawning and nursery areas critical to the continuation of this activity are focussed in the

landscape units of Chandos Lakelands, Dummer Moraine, Ennismore and Scugog.

Historical and Archaeological Resources

Numerous types of heritage resources provide opportunities for future tourism development within the study zone. Two archaeological locations have already been developed as attractions: Serpent Mounds in Rice Lake Unit and Petroglyphs on Stony Lake in the Dummer Moraine landscape unit. Other concentrated areas worthy of consideration occur on the shores and islands of Lake Simcoe, Rice Lake, Stony Lake, Balsam Lake and Lake Scugog.

An excellent opportunity for a themed festival is afforded the Village of Haliburton where large gatherings of trappers and buyers met twice a year between 1865 and 1895.

The Agricultural Era of the study zone is represented through the restoration of the Lang and Hope mills near Keene. Remains of similar mills exist in Hastings and Lindsay and present opportunities for adaptive re-use as foodservice and accommodation facilities. Numerous colonization roads were developed on the shield in the middle 1800's in response to increased emigration from the United States and the need of the lumber industry for agricultural products. Communities such as Bancroft, Maynooth, Gooderham and Kinmount originally developed because colonization roads intersected at those points. The remains of the colonization roads could be developed as cross-country skiing and hiking trails.

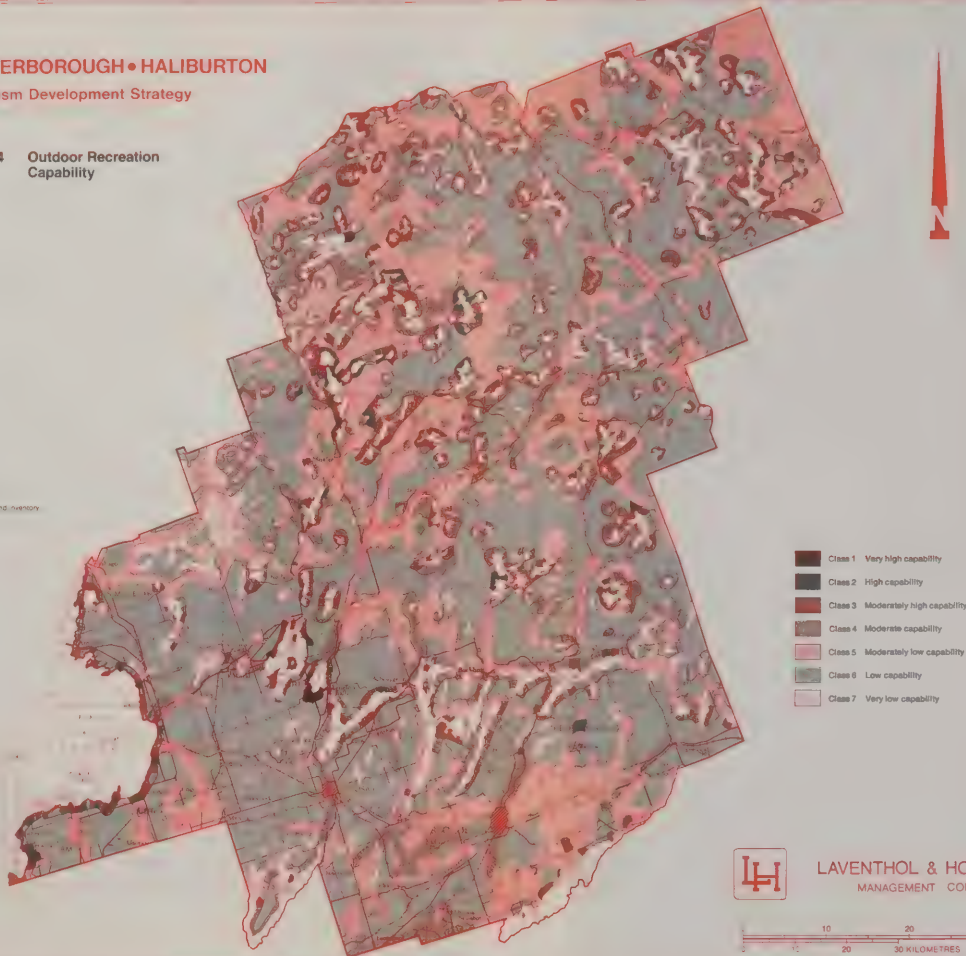
The square timber industry began on the Trent River in the 1820's and provided the impetus for the building of the Trent Waterway. Peterborough became a major sawmilling centre, as did Lakefield, Buckhorn, Bobcaygeon and Fenelon Falls. Interpretive programmes and heritage festivals in these communities and at the lock stations should

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Map 4 Outdoor Recreation Capability

Source:
Canada Land Inventory



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emphasize the significance of this industry to development in the zone. In the 1860's communities such as Barry's Bay, Haliburton, Minden and Bancroft developed to serve as supply and sawmilling centres. Remains of shanties and river-oriented facilities and equipment from the lumbering era are still evident throughout the study area. A few hotels and general stores which served the lumbering era are still operating. Where appropriate, these remnants of the past could be developed as historic attractions.

The Lake Simcoe Shoreline, Mariposa, Ennismore, Rice Lake and Dummer Moraine landscape units have the greatest historical and archaeological resource values.

Outdoor Recreation Capability

High recreational capability for swimming, camping, lodging or cottaging, downhill skiing and visiting historical/cultural or natural features is concentrated in the Lake Simcoe Shoreline and Haliburton Lakelands landscape units. The pockets of highest potential are associated with the shorelines of major lakes within these units. (Map 4.)

Areas possessing interesting topographic patterns proximate to water, scenic cultural and historical landscapes, and a diverse forest cover have a high capability for recreational walking, driving for pleasure, hiking, cycling, and cross-country skiing. The major river and lake systems within the Rice Lake, Haliburton Lakelands, Algonquin Highlands and Bark Lake units provide the focus for this type of activity.

Climate

Outdoor winter tourism business within the study zone is dependent on an adequate snow and/or ice cover and an acceptable level of comfort and weather satisfaction. Climatic conditions within the zone are such that the Haliburton Lakelands and Algonquin Highlands landscape units have the greatest outdoor winter tourism development potential. All of the

landscape units in the Paleozoic area are, at best, only marginally acceptable situations for winter-based outdoor tourism developments.

The length of the summer season within the zone gives an important indication of tourism development potential for summer-oriented facilities, services and attractions. The summer season, as indicated on Map 5, is significantly longer in the Paleozoic section of the zone than it is in the Precambrian area. Only the Algonquin Highlands Unit, because of its short, cool season, has a low summer resource value for tourism development.

INFRASTRUCTURE EVALUATION

Commercial Roofed Accommodation

The Peterborough-Haliburton zone contains over 600 commercial roofed accommodation properties. These establishments range from three to four-unit cottages operating during the summer only to resort lodges of over one hundred units which operate throughout the entire year. A full description of all establishments is contained in Volume 2 - Section III.

Commercial roofed accommodation is unevenly distributed between the northern and southern sections of the study zone. Not only are the establishments themselves larger in the northern landscape units, but the total number of units (57%) is also greater.

Significant variations also occur in the distribution of types of accommodation in the northern and southern landscape units. Hotel/motel accommodation capacity in the southern section is nearly triple that of the north. Ennismore and the Lake Simcoe Shoreline provide the focus for much of the existing hotel/motel development.

Commercial cottage capacity is concentrated in Dummer Moraine, Ennismore, Rice Lake, Cavendish and Haliburton Lakelands landscape units. While the

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Map 5 Climate

Source:

Seasonal cycle diagrams adapted from Crowe, R. B. Morley, C. J. and Bauer, W. J. The Tourist and Outdoor Recreation Climate of Ontario. Volume One. Ontario Ministry of Industry and Tourism Toronto 1977



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TABLE 2.2
PETERBOROUGH - HALBURTON FACILITIES EVALUATION

	Simcoe Lowlands				Scugog Clay Plain		Peterborough Drumlin Field			
	Lake Simcoe Shoreline	Georgina Plain	Thorah Plain	Mara Drumlin Field			Scugog Unit	Marlboro Unit	Ensignore Unit	Rice Lake Unit
Commercial Roofed Accommodation	3	2	1	1	1	1	1	2	3	2
Food & Beverage Establishments	3	2	1	1	1	1	1	3	3	2
Transient & Seasonal Campgrounds	3	1	1	1	1	2	1	2	3	3
Outdoor Recreational Facilities	1	1	1	1	1	1	1	2	3	1
Downhill &/or Cross-Country Ski Areas	3	3	1	1	1	1	1	2	3	3
Marina Facilities	1	1	1	1	1	1	1	2	1	1
Snowmobile Trails	1	1	1	1	1	1	1	2	2	1
Hiking Trails	2	2	1	1	1	1	1	1	1	1
Equestrian Facilities	1	1	1	1	1	1	1	1	1	2
Canoe Routes										
Events & Attractions	1	2	1	1	1	1	1	3	3	3
Transportation	3	2	3	3	3	1	1	2	3	3
Variety of Access Modes	3	3	3	3	2	2	2	2	3	2
Access Orientation	3	3	2	2	2	2	2	2	3	2
Commercial Roofed Accommodation	1	2	2	3	3	2	2	2	2	1
Food & Beverage Establishments	1	2	2	3	3	2	2	1	1	1
Transient & Seasonal Campgrounds	1	2	3	2	2	2	1	2	3	2
Outdoor Recreational Facilities	1	2	2	3	3	2	2	3	3	3
Downhill &/or Cross-Country Ski Areas	1	1	3	2	2	1	1	2	1	3
Marina Facilities	1	2	2	2	3	3	3	3	3	3
Snowmobile Trails	1	1	1	1	1	2	1	2	3	1
Hiking Trails	1	1	3	3	3	3	2	2	1	1
Equestrian Facilities	1	3	2	3	3	1	3	3	3	1
Canoe Routes										
Events & Attractions	1	2	2	3	3	2	3	2	2	2
Transportation	1	2	1	1	1	1	1	1	1	1
Variety of Access Modes	1	2	2	1	1	1	1	1	1	1
Access Orientation	1	2	1	1	1	1	1	1	1	1

	Dummer Cavendish Montezuma		Algonquin Unit	
	Carden Plain	Moraine	Haliburton Lakelands	Chandos Lakelands
West Carden Plain	1	2	2	1
East Carden Plain	1	2	2	1
Carden Plain	1	2	2	1
Algonquin Unit	1	2	2	1

number of resort establishments is greater (60%) in the northern section of the study zone, the total number of units is only slightly (6%) greater. The largest concentrations of resorts are located in Dummer Moraine, Cavendish, Lake Simcoe Shoreline and Haliburton Lakelands landscape units. (Map 6.)

The existing commercial accommodation stock is largely of medium to low calibre. Many establishments are too small to be economically viable. They are characterized by limited services, fair physical condition and, in a number of cases, by part-time owner/operators. In general, commercial establishments in the Lake Simcoe Shoreline, Ennismore and Cavendish landscape units are larger in size, provide more amenities and are more likely to operate throughout the year than those in the other units.

Food and Beverage Establishments

The food and beverage establishments in the study zone have been classified as either upscale licensed table service, licensed table service, unlicensed table service or fast food/take-out facilities. The few upscale licensed table service establishments which do exist in the zone are generally concentrated in urban centres and in the south. Licensed table service establishments are also concentrated in the southern landscape units. For the most part, those licensed table service (including upscale) establishments located outside urban centres are in year-round resorts. Food and beverage establishments depend on the local market for most of their revenue. The larger resident population and higher disposable income levels in the southern landscape units explain the greater number of establishments found there. Only very exceptional restaurants can successfully locate outside of urban areas and away from major traffic arteries.

It is also not surprising that the greatest number of fast food/take-out businesses are located in the southern landscape units.

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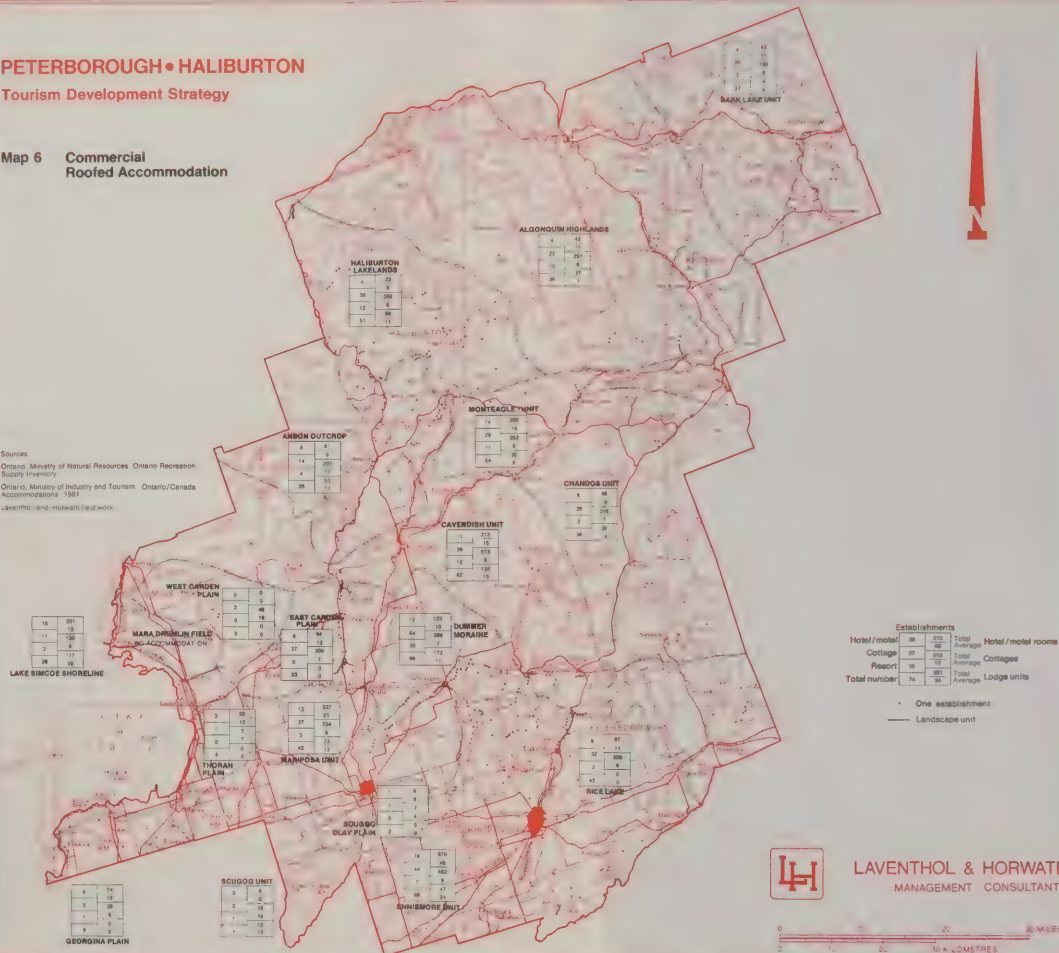
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Map 6 Commercial
Roofed Accommodation

Sources

Ontario, Ministry of Natural Resources Ontario Recreation
Supply Inventory
Ontario, Ministry of Industry and Tourism Ontario/Canada
Accommodations 1981

Laventhol and Horwath Ltd. work



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Map 7 Transient and Seasonal Campgrounds

Sources

Ontario, Ministry of Natural Resources, Ontario Recreation Supply Inventory
 Ontario, Ministry of Industry and Tourism, Ontario/Canada Camping, 1981
 Laventhol and Horwath field work



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0 10 20 30 MILES
 0 10 20 30 KILOMETRES

The type and quality of food and beverage establishments appear to reflect the variety demanded by the various local and seasonal market areas. As is the case throughout the rest of Ontario, operating hours of establishments in or near smaller centres ignore evening business and are seldom open year-round. The Lake Simcoe Shoreline, Mariposa, Ennismore, and Cavendish units provide the greatest quantity, quality and variety of food and beverage establishments.

Transient and Seasonal Campgrounds

The Peterborough-Haliburton zone, with 217 campgrounds and over 18,000 campsites, is well served by camping facilities. Approximately 24% of the campsites are government operated. Most government campgrounds in the study zone do not offer onsite electricity, water or sewage hook-ups. However, in light of increasing travel costs and the fact that Provincial campgrounds are being presented as destinations and not stop-over locations, it will be necessary to improve these campground amenities.

In general, private campgrounds in the study area offer at least some serviced sites. As well, they often have laundromats, convenience stores, marina facilities, restaurants, swimming pools and recreation programmes. An increasing number of sites within private campgrounds are rented for the full season by trailer owners. The total number and distribution of transient and seasonal campgrounds in the study zone is shown on Map 7. The larger campgrounds are located in the southern part of the study area. Private campgrounds in the southern portion of the zone are predominantly seasonally rented, while in the north, transient sites are more common. Campgrounds located on the Trent-Severn Waterway tend to offer marine facilities.

The present concentration of private and government operated, transient and seasonal campgrounds in Lake Simcoe Shoreline, Ennismore, Rice lake, Dummer Moraine and Algonquin Highlands generally reflects the areas having the most appropriate resources for campground development in the zone.

Outdoor Recreation Facilities

Downhill Skiing Facilities

There are six downhill skiing developments in the study area. Four (Bethany, Devil's Elbow, Omemee Ski Resort and Cedar Mountain) are in Rice Lake and Ennismore units. Mt. Madawaska is near Barry's Bay in the Bark Lake Unit and Sir Sam's Ski Area is in the Haliburton Lakelands near Haliburton Village.

Throughout the study area, but particularly in the northern portion of the zone, locations can be found with the necessary vertical drop to allow downhill skiing facilities. In areas south of the Kawartha Lakes, the snowfall is not reliable, necessitating expensive artificial snow-making. North of the Kawartha Lakes, the snowfall is usually sufficient but this part of the study area is beyond the normal day-trip range from major urban centres. Thus, the potential for downhill ski development is limited.

Cross-Country Skiing Facilities

The major concentrations of trail networks are in the Chandos Lakelands unit near Apsley, the Algonquin Highlands, the Cavendish Unit near Haliburton and the Dorset region of the Haliburton Lakelands Unit. In addition, many of the area's destination resorts, Provincial Parks and conservation areas provide shorter trails.

The potential for further trail development rests with in-filling those areas proximate to existing facilities and linking existing trail networks to facilitate the development of hut-to-hut skiing.

Recreational Boating Facilities

While the Peterborough-Haliburton zone has a significant number of recreational boating facilities as evidenced from Map 8, few offer a

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Map 8 Recreational Boating Facilities

Sources:
Ontario Ministry of Natural Resources Ontario Recreation Supply Inventory
Ontario Ministry of Industry and Tourism Ontario/Canada Boating 1981
Laventhol and Horwath field work



full range of marina services required to properly service the larger and more sophisticated boats. Only 16 facilities within the study area provide seasonal and transient docking spaces, boat launching, fuel, repairs, supplies, sewage pump-out and rentals.

The Lake Simcoe Shoreline, Dummer Moraine and Ennismore landscape units, all bordering the Trent-Severn Waterway, have the greatest concentrations of fuller service boating facilities. Even in these areas, however, less than five facilities can accommodate houseboats. Throughout the study area, the most common services offered are fuel and supplies. Sewage pump-out service is generally available only on the Trent-Severn Waterway.

Opportunities exist for the upgrading and expansion of present marinas on the Waterway in particular for those providing facilities and services capable of accommodating houseboats.

Snowmobile Trails

Snowmobile trails are concentrated in the Precambrian Shield area of the study zone, particularly in the Haliburton Lakelands, Cavendish and Chandos Lakelands units. The majority of the trails are maintained by local snowmobile clubs, in co-operation with the Ministry of Natural Resources.

Those landscape units containing the preponderance of the present trails have the most appropriate physical resource base for this type of winter activity. Further development opportunities exist in linking the present trail systems together, allowing snowmobilers the option of extended trips similar to the possibilities provided by Sno 1.

Hiking Trails

Three major hiking trails exist in the study area: Highland Hiking Trail in Algonquin Park; the Quinte-Hastings Recreational Trail from Picton to

Lake St. Peter through Monteagle and Algonquin Highlands landscape units; and the completed portions of the Ganaraska Trail.

The potential exists for the establishment of more hiking trails within the study area, especially along abandoned rail lines and former colonization roads. These routes are located mainly in the Precambrian Shield region of the zone. Available Crown land in the northern portion of the study area would facilitate easier development of new hiking trails by avoiding the difficulties of negotiating with private land owners.

Equestrian Facilities

Horseback riding centres are located throughout the study area. In the Georgina Plain, Mariposa and Rice Lake units specialized equestrian stables exist which are complementary to farming operations. Those located in the Algonquin Highlands, Dummer Moraine and Cavendish units are operated in conjunction with childrens' summer camps.

Canoe Routes

The lake and river resources suitable for canoeing in the study zone are extensive. Most canoe route development has taken place in Haliburton Lakelands, Algonquin Highlands, Anson Outcrop and Cavendish units. The creation of Ontario's newest Provincial Park (Madawaska River Waterway Park) will increase the supply of whitewater canoeing opportunities as well as raise the profile of this activity in the study area.

Events and Attractions

A wide variety of events and attractions exist within the study area. A complete listing of all events and attractions in each landscape unit appears in Volume 2 - Section III. With few exceptions, the events and attractions within the Peterborough-Haliburton area are of minor significance and do not act as major catalysts for tourism. The

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Map 9 Transportation Network

Sources

Ontario Ministry of Transportation and Communications
County maps

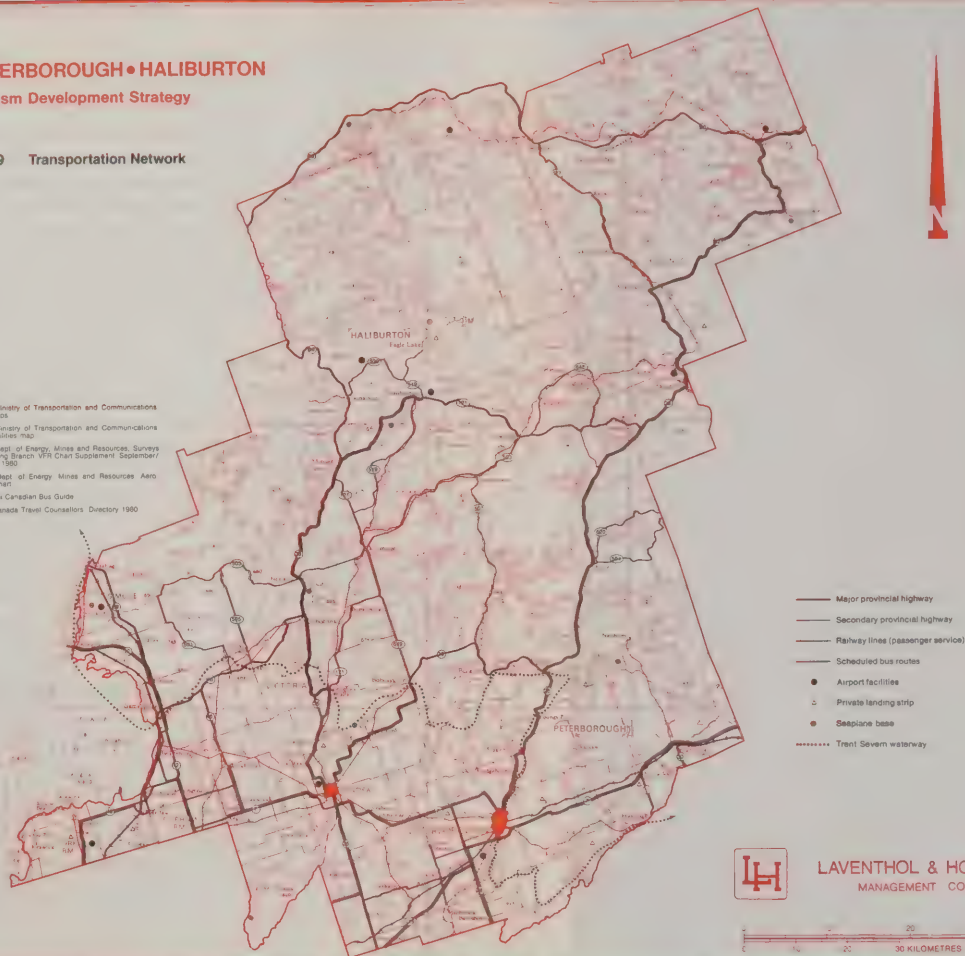
Ontario Ministry of Transportation and Communications
Airport facilities map

Canada, Dept. of Energy, Mines and Resources, Surveys
and Mapping Branch VFR Chart Supplement, September/
December 1980

Canada, Dept. of Energy, Mines and Resources, Aero
nautical Chart

The Official Canadian Bus Guide

Ontario/Canada Travel Counsellors' Directory 1980



- Major provincial highway
- Secondary provincial highway
- Railway lines (passenger service)
- Scheduled bus routes
- Airport facilities
- Private landing strip
- Seaplane base
- Trent-Severn waterway



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majority of attractions are open in the summer only, except for those in urban areas, such as Peterborough and Lindsay.

There is the potential, in areas with growing winter tourism markets (such as Cavendish, Haliburton Lakelands and Algonquin Highlands units) to adapt attractions for year-round use. More winter and shoulder season events could be developed in these areas as well. Attractions based on the physiographic, historic and archaeological resources such as Petroglyphs or Serpent Mounds could also be developed. Mariposa, Ennismore, Rice Lake, Cavendish and Anson Outcrop provide the focus for major concentrations of events and attractions in the zone.

Transportation

The existing overall road network within the study area is adequate for the present traffic load, despite a 100% increase on some provincial highways on summer weekends. The proposed improvements, as outlined in Volume 2 - Section II, will be sufficient to accommodate the increased traffic activity associated with the development of new tourism facilities and the growth in resident population.

As indicated on Map 9, the southern part of the study area is better served by all modes of transportation. The frequency of service by inter-city buses is higher, air and rail passenger services are available and the road network is more extensive and of higher quality.

RESOURCE BASE DEVELOPMENT IMPLICATIONS

The analysis of this zone's resource base highlights key planning perspectives of importance to the tourism development strategy. The implications of these viewpoints relate to the significance, capability and development thrust appropriate for tourism within the zone. They are discussed with respect to physical, wildlife, historical and archaeological, outdoor recreation and climatic resources.

Physical and Wildlife Resources

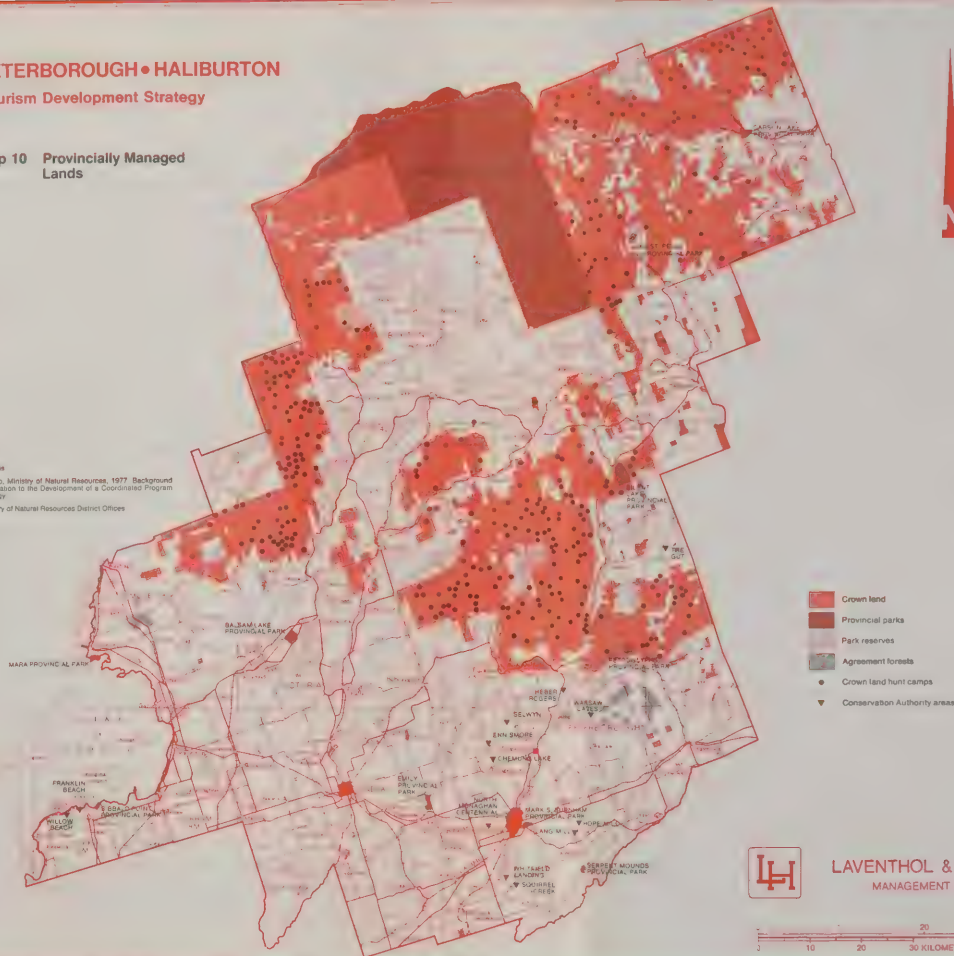
- These resources are primarily of regional and local significance within the study zone. With the possible exception of the natural resources found within Algonquin Park and along the Trent-Severn Waterway, the resource base has limited capability to capture national and overseas markets seeking destinations of outstanding and unique quality.
- Much of the natural resource base significant to tourism has been developed in the Paleozoic region. Many of the wildlife resources within this region are experiencing intensive human pressure. Tourism development within this southern area should focus upon creating tourism opportunities which are non-consumptive (e.g. wildlife interpretive programmes and waterfowl viewing days in major staging areas) and which respect the integrity of environmentally sensitive areas. At the same time the needs of the tourism industry should be recognized in sport fishery and wildlife management programmes.
- Utilization of the natural resource base for tourism within the Precambrian region is relatively low and development potential is promising. Much of the potential, however, is situated on provincially owned Crown land (Map 10). Public sector tourism development on these lands should complement and support private sector tourism.
- Environmental degradation because of acidic precipitation represents a major threat to long-term tourism development within this zone. Acidic precipitation, commonly known as acid rain, is acknowledged by scientists and government to be one of the most pressing environmental issues facing a significant portion of the study zone. The chief and immediate concern about acid rain is that it ultimately affects aquatic life in lakes and watersheds which are primarily associated with the Precambrian portion of the

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Tourism Development Strategy

Map 10 Provincially Managed Lands

Source:
Ontario, Ministry of Natural Resources, 1977. Background
information to the Development of a Coordinated Program
Strategy.
Ministry of Natural Resources District Offices



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MANAGEMENT CONSULTANTS

zone. These water bodies are particularly sensitive to acidity because they have very little capability for buffering or neutralizing the acid rain.

It is estimated that many of the lakes which currently support recreational fishing in the northern section of this zone will be biologically dead within 20 years unless remedial steps are taken to deal with this problem. As an indication of the seriousness of this problem, a Ministry of the Environment survey, Acid Sensitivity Survey of Lakes in Ontario, identifies 70% of the lakes in Haliburton County as being in either the extremely sensitive or moderately sensitive categories.

- The future tourism character of the Trent-Severn Waterway is plagued by increased plant nutrients and Eurasian water milfoil. Together, these phenomena severely reduce both the quality of sport-fishing and tourism/recreation experiences on the Waterway.

Historical and Archaeological Resources

- Known archaeological resources within the study area are limited in both number and diversity. The proposed strategy encourages their interpretation and utilization in a tourism context only when the preservation of the resource can be ensured.
- While readily apparent in most landscape units, the use of historical resources in a tourism development context has been left largely untapped. Government leadership in the identification and funding of historical resource development projects should be an integral part of this tourism strategy.

Outdoor Recreational Resources

- Opportunities for intensive recreational development are limited to concentrations along the shorelines of major waterways

in the zone. These same areas are frequently environmentally sensitive. The strategy encourages such development by both the public and/or the private sector only in those shoreline areas which are environmentally durable.

- Moderate to high capability extensive outdoor recreation resource potential exists throughout the study area. These extensive recreational areas should be tied to high intensity recreation locations by means of specialty market touring corridors whenever possible.

Climate

- The duration of reliable snow cover is the most dramatic constraint to winter tourism development within the study area. Without reliable snow cover over a sustained period of time, tourism development based upon outdoor winter recreation opportunities is extremely marginal. While artificial snowmaking can reduce the risk associated with many winter development opportunities, in most cases the costs of such undertakings are prohibitive. This strategy suggests that snow-based tourism developments only be encouraged in the Precambrian section of the study zone. Short-term winter tourism undertakings (Kawartha International Snowmobile Races) which rely on human creativity rather than sustained snow cover should be encouraged throughout the zone.

TOURISM INFRASTRUCTURE DEVELOPMENT IMPLICATIONS

Commercial Roofed Accommodation

- Existing commercial roofed accommodation within the study zone is well distributed. Characterized by both limited services and only fair physical condition, it often does not match the expectations of a highly competitive marketplace. Upgrading, expansion and, in some cases, new development of facilities is required at strategic locations within the study zone.

- Destination resorts are limited in both number and distribution. While most are strategically located, many lack the necessary ancillary activities, services, facilities and programmes required to attract and hold visitors on a multi-season basis. This strategy encourages the upgrading and expansion of existing destination resorts, as well as the creation of new facilities at particular nodes within the area.
- Many existing housekeeping facilities require considerable upgrading in order to extend their season of operation. However, the unfavourable economic reality associated with improving such free-standing facilities makes this process not feasible in most cases. The potential for upgrading is higher in those areas with extended season potential.
- Some existing destination resorts are actively seeking to capture new conference markets. Few operators have an understanding of either the competitiveness or physical plant and associated capital requirements of this market. Conference facility development should only be encouraged in those areas with high extended stay development potential.
- Commercial roofed accommodation within the zone generally lacks a sound financial base of operation. As such, it is in a weak position to react positively to strong competition from new establishments.
- Any new facilities established should be strategically situated and designed to: capture markets not currently attracted to existing facilities; provide services and facilities not economically feasible at existing facilities; and engender a greater desire to upgrade the plant in surrounding facilities.

Food and Beverage Establishments

- Food and beverage facilities in the urban centres have not kept pace with changing market needs. Many facilities are of a low quality and are strongly seasonal in character. Many require upgrading programmes as well as development themes reflecting the character of the area's tourism resource base. These upgrading programmes should be encouraged at strategic locations within the zone.

Outdoor Recreation Facilities

- Seasonal campgrounds are well distributed throughout the study area. Many lack aesthetic appeal relative to provincial campgrounds. Seasonal campground operators should be encouraged to upgrade their facilities' appeal to create a more attractive image in the eyes of the travelling public.
- The number and distribution of full service marinas is inadequate within the study zone. While the area has numerous recreational boating facilities, most are small and underserviced. A significant lack of sewage pump-out facilities exists throughout the zone. Efforts should be made to upgrade and expand those marinas which have strategic locations within the zone.
- The lack of marina facilities of sufficient size and amenity mix to meet the demands of the larger boats and houseboats provides particular development opportunities within the Trent-Severn Waterway.

Transportation

- Transportation networks within the zone generally provide an adequate level of service for the tourism industry. The system of county, regional and provincial roads is more efficient in terms

of volume capabilities and market access in the southern section of the study area. In the northern section, tourism development potential is limited to only a few routeways which provide reasonable access to both markets and the tourism resource base. However, before expansion of the northern road network is undertaken, better use (e.g. scenic tours, roadside picnic areas, scenic lookouts) and promotion of the existing network should be encouraged.

- The limited availability of air and passenger rail transportation access to the zone suggests that the area will continue to be oriented toward auto-based tourism markets. Marketing efforts should continue to focus on this market.
- The Trent-Severn Waterway has points of high traffic congestion along its route which hinder the flow of tourists throughout the corridor. Development opportunities should be encouraged which will help to alleviate tourism pressure at the congestion points.

PRIORITY TOURISM DEVELOPMENT LANDSCAPE UNITS

Based upon the assessment of the zone's natural resource base and the existing tourism infrastructure described in detail in Volume 2 - Section II, it is apparent that some landscape units have relatively greater potential for tourism development than do others. Because the development potential is not equally distributed either between or within individual landscape units, tourism development should be focussed in certain areas. In the Precambrian section of the study zone, tourism development should be focussed at points of high potential in the Cavendish, Monteagle, Haliburton Lakelands, Algonquin Highlands, Chandos Lakelands and Bark Lake landscape units. In the Paleozoic region of the study area, development should be centered at high potential locations in the Lake Simcoe Shoreline, Mariposa, Ennismore, Rice Lake, East Carden Plain and Dummer Moraine landscape units.

SECTION III
MARKET ANALYSIS

INTRODUCTION

This section provides quantitative and qualitative data on the tourism markets of the Peterborough-Haliburton Tourism Zone. Geographic and specialty markets are identified and discussed. Highlights of the demographic and trip characteristics of the geographic market segments are presented. Further details of the geographic markets are available in Volume 2 - Section V.

Short-term forecasts from 1981 to 1986 are presented for each of the market segments. The projections are based on trend extrapolations and, as such, provide only a relative indication of market demand. The implications arising from the changing economic, demographic and societal lifestyles provide a further scenario of future tourist demands in the study zone.

While the Peterborough-Haliburton Tourism Zone draws from all segments of the local, regional, national, American and other international markets, some segments are more important than others. Trip characteristics and demographics vary widely from one market segment to the next. In this section, brief sketches are provided for the characteristics which have the most influence on travel patterns including: seasonality, trip purpose, trip duration, type of accommodation, mode of transportation and expenditures. Further details of each are presented in Volume 2 - Section V.

Available data does not relate directly to the study zone. However, the information presented has been derived from sources pertaining to either the Central Ontario Travel Association Area or the Lake Ontario Economic Region. These areas overlap and correspond reasonably well with the study zone. The data is thought to be reasonably applicable to the current situation within the study zone.

Data limitations render it impossible to state with certainty the current overall level of tourism demand. The statistics for the various markets have been collected over a number of years and, occasionally, the operational definitions used have varied. It is assumed, however, that the relative proportions accorded to the various trip characteristics in each of the markets have not changed significantly over the years and that comparisons on this basis are possible.

MARKET SEGMENTS

The study zone's tourism market is separated into four major geographic segments. Special consideration is also accorded to Metro Toronto, an important sub-segment of the Ontario resident market. The geographic segments and their respective sources of information are as follows:

- Ontario Residents - 1976 Ontario Household Survey;
- Metro Toronto Residents - 1976 Ontario Household Survey;
- Other Canadian Residents - 1979 Statistics Canada Travel Survey;
- United States Residents - 1974 U.S. Auto Exit Survey;
- Overseas Residents - 1979 CGOT Overseas Marketing Reports.

Table 3.1 presents the estimates and forecasts for total travel to the Peterborough-Haliburton Tourism Zone for the period from 1979 to 1986. Details of the methodology and rationale employed are presented in Volume 2 - Section V.

Ontario Residents

Ontario residents are the most significant generators of travel to the Peterborough-Haliburton Tourism Zone. In 1980, Ontario residents are estimated to have generated approximately 10.9 million person-trips to the study zone. This represents 96.8% of the estimated 11.3 million person-trips to the area. It is estimated that demand from this market segment will increase to 12.2 million person-trips by 1986, suggesting a compound average annual growth rate of 1.8% between the years 1979 and

TABLE 3.1
MARKET FORECASTS
PETERBOROUGH-HALIBURTON TOURISM DEVELOPMENT ZONE
1979 - 1986

<u>Person-Trips</u>					
<u>Year/Market</u>	<u>Ontario Residents</u>	<u>Other Canadian Residents</u>	<u>United States Residents</u>	<u>Overseas Residents</u>	<u>Total</u>
	(000's)	(000's)	(000's)	(000's)	(000's)
1979	10,696	74.0	278.8	6.6	11,055
1980	10,905	74.4	276.0	6.9	11,262
1981	11,118	74.7	278.5	7.4	11,479
1982	11,307	75.1	282.0	7.8	11,672
1983	11,488	75.1	286.6	8.2	11,858
1984	11,695	75.1	289.2	8.6	12,068
1985	11,917	75.1	292.1	9.0	12,293
1986	12,155	75.1	295.0	9.5	12,535
Compound Average Annual Growth Rate %	1.8%	0.2%	0.8%	5.3%	1.8%

1986. Maintaining or increasing this growth will depend upon the ability of the study zone to develop distinct competitive advantages which encourage Ontario residents to continue and/or commence visiting the study zone.

The most important characteristics of travel by Ontario residents to the study zone are as follows:

- There is no definite seasonality pattern for trips taken by Ontario residents. Over one-third of travel, however, occurred during the third quarter of the year (i.e. the months of July, August and September);¹
- 54.1% of person-trips were initiated for either vacation or week-end/short-term trip purposes;
- 48.3% of person-trips were of a duration of one to three nights;²
- 50.5% of person-nights were spent at private cottages;³
- 66.1% of trips involved parties of one or two persons;⁴
- 97.0% of person-trips were made using automobiles;
- The largest expenditures were for food and beverages (26.3% or \$53.9 million), public transportation (20.1% or \$41.2 million) and service stations (20.1% or \$41.2 million).

Metro Toronto Residents

Metro Toronto residents generated 48%, or 4.9 million, of the total person-trips taken by Ontario residents to the study zone in 1976. It is believed that the relative proportion of trips by Metro Toronto residents did not change significantly between 1976 and 1980. Hence, in 1980 Metro

Toronto residents are estimated to have generated 5.2 million person-trips to the zone.

The most significant travel characteristics of this market include:

- No dominant seasonal patterns of travel, although 38.4% of person-trips occurred during the period from July to September;
- 62.8% of person-trips were initiated for the purposes of either vacation or weekend/short-term trips;
- 32.2% of person-trips involved day visitation and 38.8% were of a one or two-night duration;
- 60.9% of person-nights were spent at private cottages;
- 70.4% of trips were made by one or two-person parties;
- 98.3% of person-trips were made using automobiles.

Other Canadian Residents

In 1980, residents from Other Canadian provinces (i.e. provinces other than Ontario) are estimated to have generated 74,370 person-trips, or less than 1% of total person-trips to the Peterborough-Haliburton Tourism Zone. Projections for travel on the part of Other Canadians show virtually no growth. By 1986, Other Canadians are expected to be generating approximately 75,116 person-trips per year. This forecast is based upon an assumed compound average annual growth of 0.2% between the years 1979 and 1986.

The major travel characteristics of this market are summarized as follows:

- 45.9% of all travel occurred during the period from July to September, suggesting seasonal tendencies for travel on the part of Other Canadian residents who visited the zone;
- 51.4% of person-trips were generated for the purposes of visiting friends or relatives and 27% were for pleasure/vacation purposes;
- 75.0% of person-trips had a duration of one to five nights;
- 74.4% of person-nights were spent at the homes of friends or relatives;
- 86.6% of trips were made by one or two-person parties;
- 76.1% of person-trips were made using automobiles;
- Major expenditures were for food and beverages (29.3% or \$3.2 million), retail sales and miscellaneous (26.6% or \$2.9 million) and service stations (20.6% or \$2.2 million).

United States Residents

Americans generated 276,000 person-trips to the study zone in 1980. This represents 2.4% of total visitation to the zone. The number of person-trips generated by American residents is forecast to change only minimally such that American visitation in 1986 is projected to be 295,000 person-trips. This estimate is based upon an assumed average annual increase of 0.8% for the period from 1979 to 1986.

Following are the key features of American visitation to the study zone:

- 67.2% of all person-trips occurred during the period from July to September;
- 68.9% of person-trips were generated for pleasure-related purposes;

- 69.1% of person-trips had a duration of four or more nights;
- 50.4% of person-nights were spent in private cottages;
- 85.8% of person-trips were made using automobiles;
- Largest expenditures were for food and beverages (32% or \$7.2 million) and accommodation (23% or \$5.2 million).

Overseas Residents

Overseas residents comprise a very small proportion of total travel to the Peterborough-Haliburton Tourism Zone. In 1980, the total number of person-trips generated by overseas visitors was estimated to be 6,956 person-trips, or less than 0.1% of total travel to the zone. Based upon an anticipated compound average annual growth rate of 5.3% for the period from 1979 to 1986, it is assumed that in 1986 overseas resident travel will produce 9,499 person-trips. Although this market is projected to exhibit the most robust rate of growth relative to other markets, its growth rate is not expected to match the growth levels of the late 1970's.

Primary characteristics of the trips made by overseas residents include:

- 51.6% of person-trips occurred from July to September;
- 43.1% of person-trips were generated for the purpose of visiting friends and relatives and 23.8% had pleasure-related purposes;
- 82.9% of person-trips involved extended trips;⁵
- Major expenditures were for public transportation (32.6% or \$456,400), food and beverages (22.3% or \$312,200) and retail sales and miscellaneous (21.9% or \$306,600).

ENDNOTES

1. The data relating to "seasonality" have been gathered according to quarters of the year. First quarter is January, February and March; second quarter is April, May and June, etc. Therefore, throughout the report, when months are referred to in a manner such as "between July and September", this means from July 1 to September 30.
2. "Person-trips" account for each trip taken by travellers, regardless of party size. A party of three who travelled together in one party would represent three (3) person-trips.
3. "Person-nights" account for each trip taken by travellers who made overnight stops during their travel. Therefore, a party of three who stayed two nights in an area would represent six (6) person-nights.
4. "Trips" are synonymous with parties. Therefore, three persons travelling together would represent only one trip, but three (3) person-trips.
5. "Extended trips" are defined as all trips other than those which involved day-visitation only. That is, "extended trips" involved staying overnight in the study zone for one or more nights.

SPECIALTY MARKETS

Boating

Boating has undergone continuous growth over the past several years. The number of Canadian households owning one or more boats increased from 733,000 (12.4% of households) in 1971 to 1.2 million (15.5% of households) in 1980. This represents a compound average annual growth of 5.7%.¹ Sailboat ownership (7.8% compound growth) increased at a faster rate than motorboat ownership (2.8% compound growth).²

The province of Ontario experienced a moderate compound growth of 4.9% in household ownership of boats during the years 1971 to 1980. In 1980, approximately 16.2% of Ontario households owned at least one boat.³

The following facts illustrate the magnitude of Ontario's boating market:

- There are an estimated 1.1 million boats in Ontario, 2% of which are used for rental purposes.⁴
- More than 3 million Ontario residents went boating in 1979, accounting for 42.5 million boater days. Approximately 15% of boater days occurred on the Trent-Severn Waterways.⁵
- There was an average of 56 boater days per boat in Ontario where the boating season is estimated to average 120 days.⁶
- Ontario receives between 85% and 90% of all annual American boat entries to Canada. In 1978, 743,134 Americans entered Ontario by boat.⁷

Boating is expected to maintain its position as a significant recreational activity and popular tourist activity. Valid reasons for forecasting the continued growth and popularity of boating include:

- People have more leisure time;
- Boats have been good personal investments over the last 10 years;
- People are allocating more funds to recreation than ever before.

Moreover, boating is related to other favoured activities in Ontario, including fishing (19 million occasions throughout Ontario in 1979) and water skiing (250,000 occasions throughout Ontario in 1979).⁸

Currently, it is estimated that the preponderance of boats in Ontario are less than 20 feet in length. While the small craft market will persist, it is possible that bigger boats will comprise somewhat larger proportions of the total number of boats in the future. The following are implications for the study zone:

- Although there presently exists only a small population of boats which can be used for overnight accommodation (the estimate is 16,000 to 24,000 boats) in Ontario, this number is increasing annually which suggests that the market for "boat camping", "cruising" and supporting facilities is also growing.⁹
- The greater numbers of small craft at the present time implies opportunities to increase boat-trailering activities to areas such as Peterborough-Haliburton. To date, trailering has not grown at the same pace as boating. However, the provision of greater numbers of quality facilities to complement the natural resources might entice people with smaller boats to travel to different areas to try new boating experiences. Trailering activity in Ontario presently emanates primarily from northern U.S.A., Manitoba and Quebec.
- The immediate demand calls for concentration on the development of launching facilities; however, the future possibility of greater numbers of large boats dictates an additional need to plan for the development of more wet berths. For example, Table 3.2

TABLE 3.2
DEMAND AND SUPPLY FOR BERTH AND RAMP FACILITIES
IN THE TRENT-SEVERN - LAKE SIMCOE AREA
1979

	<u>BERTHS</u>				<u>RAMPS</u>			
	<u>Demand-Supply</u>				<u>Demand-Supply</u>			
	<u>Demand</u>	<u>Supply</u>	<u>Occasions</u>	<u>Berth</u>	<u>Demand</u>	<u>Supply</u>	<u>Occasions</u>	<u>Berth</u>
1979	2,595	2,830	+235	+1,565	2,090	2,240	+150	+40
Projected 1985	3,230	2,830	-400	-2,665	2,525	2,240	-285	-76

Source: Program for Recreational Harbours in Ontario, Government of
Canada Fisheries and Oceans, November, 1979

demonstrates that in 1979 there was a slight surplus of both ramps and berths along the Trent-Severn and Lake Simcoe waterways. There is, however, a predicted deficit of facilities for 1985. It is the lack of such facilities which will impose the major constraint upon the potential growth of the boating industry.¹⁰

In recent years there has been a marked increase in the demand for seasonal berths. Although the high costs of establishing facilities often inhibit the opening of new marinas, it is possible to expand existing facilities through additional protective works. Dredging may be the least expensive way to develop additional berths. In the Trent-Severn and Lake Simcoe areas there is an annual growth of 3.7% for berths and 3.2% for ramps predicted until 1985.¹¹ Total growth between 1979 and 1985 is estimated at 24.4% for berths and 20.8% for ramps.¹²

The following three factors are essential to the successful operation of a marina:

- Location in an area which is accessible to a large recreational boating market;
- Access to attractive boating waters;
- A range of facilities which can satisfy a wide variety of boaters and provide the operator with sufficient cash flow.

The lakes in the Peterborough-Haliburton Tourism Zone provide opportunities for well-protected boating suited to a variety of boating markets. The waterways are neither too big nor too rough for most boating experiences. Table 3.3 illustrates that the Trent-Severn system plays a dominant role in boating and fishing occasions in Ontario.

TABLE 3.3

BOATING AND BOAT-FISHING OCCASIONS BY ONTARIO
AND NON-ONTARIO VISITORS FOR SELECTED CONSUMPTION ZONES

1979 (rounded to nearest 50,000)

(000's)

<u>Zone</u>	<u>Resident Boating</u>			<u>Canoe/Rowboat</u>	<u>Non-Resident</u>		<u>Boat-Fishing</u>		<u>Grand Total</u>
	<u>Cabin</u>	<u>Other Motor/Sail</u>			<u>Resident</u>		<u>Residents</u>	<u>Non-Resident</u>	
St. Lawrence	50	750		50	200		450	100	1,600
Eastern Lake Ontario	250	1,000		250	200		700	100	2,500
Western Lake Ontario	1,400	1,000		500	100		250	-	3,200
Lake Erie	400	1,650		750	300		1,000	100	4,200
Lake Huron	250	1,250		400	350		700	100	3,050
Georgian Bay	650	3,050		1,500	900		1,700	300	8,100
Eastern Ontario	150	3,050		1,250	500		2,250	250	7,400
Trent-Lake Simcoe	400	4,550		1,650	400		2,950	200	10,100
Southwestern Ontario	-	900		750	50		350	-	2,050
Algonquin	250	4,200		1,900	550		1,800	150	8,850
Northeastern Ontario	250	3,300		1,150	800		2,700	500	8,700
Northwestern Ontario	150	1,650		500	1,650		1,250	900	6,050
Total Ontario	4,100	26,300		10,650	6,100		16,050	2,750	65,950

Source: Program for Recreational Harbours in Ontario, Government of Canada Fisheries & Oceans, November, 1979

Note: The Peterborough-Haliburton Tourism Zone encompasses roughly three-quarters of the Trent-Lake Simcoe consumptive zone, primarily the eastern portion.

Table 3.4 provides a profile of Ontario boaters.

Houseboating is a high demand activity on the Trent-Severn Waterway. There are currently 70 to 80 houseboats available for rent between Bobcaygeon and Peterborough. A favoured route in the zone is between Bridgenorth and Peterborough, a round trip of approximately 150 miles in length which requires approximately one week to complete. Pigeon Lake is a potential area for the expansion of houseboating operations.

Houseboating operators in the zone indicated that the houseboating market is generally comprised of family groups and individuals who would not otherwise participate to a large extent in boating. This factor creates concern among marina operators who believe that houseboaters need more instruction in the operation of boats and their equipment. Inexperienced houseboaters may experience problems both in rough waters and in operating boats in confined areas which results in the damage of houseboats, other boats, docks and wharfs. Houseboating operators in the zone should consider expanding their activities to include instruction in the operating of houseboats.

The geographic target markets for houseboating in the zone include Southern Ontario, northern U.S.A. and Europe (especially West Germany). Despite increasing competition in the industry, most operators experience little difficulty in booking trips. In fact, there is concern that developed routes are becoming congested which suggests the need for additional houseboating routes. Demand is not limited to the peak summer season as retirees and fishermen are good sources of business during the shoulder periods.

TABLE 3.4
PROFILE OF BOAT PARTICIPANTS FROM THE
PROVINCE OF ONTARIO

<u>Motor Boats</u>	<u>Sailboats</u>
● 54.8% male	● 58.6% male
● 60.7% married	● 52.3% married
● 60.3% - 34 years old and younger (average = 33 years)	● 68.1% - 34 years old and under (average = 30 years)
● 80.7% achieved high school education or higher	● 85.9% achieved high school education or higher
● 48.8% employed, 23.6% students	● 51.5% employed, 29.3% students

Source: Ontario Recreation Survey, 1977

ENDNOTES

1. Statistics Canada, Catalogue #87-001, Table 1, Vol. 4, No. 3.
2. Ibid.
3. Statistics Canada, Catalogue #87-001.
4. Program for Recreational Harbours in Ontario, Volume II, Part 1, Government of Canada Fisheries and Oceans, November 1979.
5. Ibid.
6. Ibid.
7. Ibid.
8. Ibid.
9. Mr. R. Beale, an interview with Mr. R. Beale, Marine Consultant, Allied Boating Association of Canada, Toronto, Ontario (June 1981).
10. P. Williams, The Boating Industry and Marina Development, Ryerson Polytechnical Institute, 1976.
11. Program for Recreational Harbours.
12. Ibid.

Cottaging

While interest in building or purchasing a cottage remains high, other financial commitments in addition to inflationary times have placed constraints on growth in the cottaging industry. Cottaging growth has been estimated based upon the issuance of intermittent hydro permits. Table 3.5 indicates that for many townships in the Peterborough-Haliburton Tourism Zone growth has been negligible and, in some of the more sparsely developed areas, it has declined.

The County of Victoria had approximately 9,200 seasonal units at the end of 1975.¹ A compound annual growth rate of 1.5% is forecast into the 1980's for Victoria County. In Haliburton County, however, growth in cottaging stock is strong. Approximately 300 permits were issued annually in the period from 1972 to 1978.² This represented the highest increases in Southern Ontario.³ Seasonal hydro users in this area increased by 20% during the years from 1971 to 1976.⁴

The conversion of seasonal recreational homes into permanent residences is one facet of the cottaging industry which appears to be growing throughout the study zone. A survey in Victoria County reported that 38% of cottage owners planned to convert their cottages for year-round residency⁵ representing 3,500 potential conversions in existing stock.⁶ As of 1976, conversions were increasing at a rate of 1% to 2% per annum.⁷

Approximately 75% of conversions are undertaken by retired persons.⁸ A significant portion of this expanding market segment is financially secure, relatively healthy and well-acquainted with recreational and travel experiences from past participation.⁹ Although needs differ among the various age groups, it is believed that these conversions represent potential increases in demand for year-round recreation and tourism facilities.

TABLE 3.5
SEASONAL HYDRO USERS (AS OF DECEMBER 31, 1979)
COMPOUND AVERAGE ANNUAL GROWTH RATE 1971 TO 1979

<u>Selected Townships</u> <u>(by level of development)</u>	<u>Compound Average Annual</u> <u>Growth Rate</u>	<u>Average</u>
Very Heavily Developed Areas (1,000+)		
Stanhope	1.2%	2.2%
Lutterworth	3.2%	
Heavily Developed Areas (500-999)		
Verulam	0.1%	1.0%
Dummer	1.9%	
Moderately Developed Areas (150-499)		
Monmouth	5.5%	3.2%
Mariposa	0.7%	
Sparsely Developed Areas (0-149)		
Dalton	0.4%	-3.9%
Dickens	-8.3%	

Source: Ontario Hydro

Much of the demand for cottaging in the study zone is derived from Metro Toronto and the surrounding area. Geographic market data suggests that:

- Approximately 65% of cottagers in the zone have their permanent residence in Toronto;
- 21% come from locations east of Toronto;
- 10% come from locations west of Toronto;
- Approximately 5% are from out of the province.¹⁰

Cottages in Ontario owned by residents are used an average of 49 to 57 days per annum.¹¹ Prime cottaging time is currently between the months of May and October. Use of cottages is not limited to cottage owners as there also exists a seasonal market for rental cottages. About 20% of rented cottages are rented out for more than 8 weeks per annum.¹² Cottage owners, however, take three times as many weekend trips per year and twice as many vacation trips per year to cottages than do renters.¹³

Table 3.6 presents a profile of Ontario cottagers.

Swimming, boating, fishing and recreational walking are the activities most commonly engaged in by cottagers.¹⁴ In addition, more than 50% of participation in water skiing, hunting, cross-country skiing, snowmobiling, downhill skiing and skin and scuba diving take place using a private recreation home as a base. The availability of these facilities is a major factor in drawing cottagers to the zone on a year-round basis.

TABLE 3.6
PROFILES OF VISITORS TO A COTTAGE OR CHALET

- 50.3% were male;
- 63.1% were married;
- 54.4% were 34 years of age or younger, average age was 36 years;
- 80.2% had high school education or higher;
- 47.1% were employed, 20.6% were students;
- 46.5% of the population participated at least once in the previous year.

Source: Ontario Recreational Survey, 1977.

The future of the cottaging industry is related to:

- The availability of suitable, attractive sites;
- The costs of construction;
- Local planning policies;
- Environmental lakeshore and related development regulations;
- The ability to infill in existing areas and to open up new lake areas.¹⁵

ENDNOTES

1. IBI Group, Victoria County - Economic Base and Financial Impact Analysis, November 1976.
2. Haliburton Economic Development Study, Economic Development Branch, Ministry of Treasury and Economics, May 1979.
3. Ibid.
4. IBI Group, Victoria County.
5. Ibid.
6. Ibid.
7. Ibid.
8. Ibid.
9. R.L. Ragatz, "Future Demand for Recreational Properties" in Man, Leisure and Wilderness, U.S. Department of Commerce, September 1975.
10. IBI Group, Victoria County.
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12. Ibid.
13. Ibid.
14. Ibid.
15. IBI Group, Victoria County.

Recreational Fishing

In 1979, 674,000 non-Ontario residents (primarily Americans) and 2.5 to 3.5 million Ontario residents fished for sport in Ontario.¹

Approximately 38% of Ontario residents fish at least once per year. The value of fishing gear owned by Ontario residents is estimated at \$230 million.²

The increase in fishing pressure in the study zone has heightened the need for management policies to maintain a balance between the demand for fishing activity and the supply of fish. Such policies include the following:³

- Reduction and implementation of restrictions on minimum/maximum size;
- Encouragement of "catch and release" fishing activity;
- Changes in the fishing season,
- Imposition of heavy fines for poaching and destruction of fish habitat.

Sport fishing activity has increased substantially in the Peterborough-Haliburton Tourism Zone. In 1980, the Kawartha Lake system from Canal Lake to Rice Lake (including Lake Scugog) generated 2.5 million hours of angling. The Kawartha Lake system represents 4% to 5% of total fishing occasions which occur annually in Ontario and although not significant in absolute terms, this area, relative to other areas, is the single-most important in-land fishery in Ontario in terms of its economic impact and its relative amount of fishing pressure. Total angling hours on Lake Erie and Lake St. Clair are greater; however, these lakes are much larger in size and in comparison have much less commercial accommodation than the Kawartha system which has 251 accommodation facilities catering primarily to fishermen. No other area in Ontario is as well developed.⁴

There are several market segments of fishermen, including "fly-in", "boat-in", "camp-road access", "ice" and "casual" fishermen. "Fly-in" and "boat-in" fishermen tend to seek tourism facilities which provide reliable guides and equipment, competent lodge management and quality air and/or boat service. They have little concern about the presence of other support recreational opportunities⁵ and seek wilderness and relaxation and expect an assured supply of both a good size and volume of fish.⁶ Their primary motivation may be "trophy fishing" not necessarily "killing" fish.

The "camp-road access" and "camping" fishermen seek tourism facilities and locations which can provide the following:

- Secondary activities especially for family groups;
- Boat launches for those who bring their own boats and equipment;
- Food supplies;
- Information on fishing.⁷

They also expect a wilderness component and high probability of action.

Ice fishermen seek tourism destinations and facilities which provide:

- Opportunities for snowmobiling;
- Ice huts;
- Evening social environment;
- Food service;
- Warm accommodation;
- Ease of winter access.⁸

Although the social aspects of this experience are important, ice fishermen also expect action in terms of fish availability. Ice fishermen probably catch a relatively high proportion of stocked fish in many of the zone's northern lakes.⁹ Lake Simcoe and Lake Scugog are

TABLE 3.7
PROFILES OF PARTICIPANTS IN THE VARIOUS
FISHING ACTIVITY SUB-SEGMENTS

<u>Activity</u> <u>Sub-Segment</u>	<u>Characteristics</u>
General	<ul style="list-style-type: none">● Still a male dominated activity but increasing family participation■ Lower income
Camp - Fly-in	<ul style="list-style-type: none">● Male adult (90%) groups■ Tends to be older (75% over 40)■ High income■ U.S. residents comprise 90% of Ontario's "fly-in" fishermen● 77% managerial or professional■ Tends to have wide experience
Camp - Road Access	<ul style="list-style-type: none">● Predominately male groups but family activity increasing■ Lower income
Camping	<ul style="list-style-type: none">● Lower income■ Largely male
Ice	<ul style="list-style-type: none">● Male■ Ontario resident■ Tends to be day or weekend activity
Casual	<ul style="list-style-type: none">● Local resident or secondary activity to tourist

Source: Quinn, R., "Marketing and Development: How Do You Combine Them?"
Tourism Development: Approaches for the Future, The Travel
Research Association, February 1977

the two most important ice fishing lakes in the zone. Commercial ice hut rental enterprises operate out of Keswick, Jackson's Point, Pfefferlaw, Port Bolster, Beaverton, Brechin and Atherley on Lake Simcoe and Port Perry and Ceasarea on Lake Scugog.

The casual fisherman is most concerned with ease of access to fishing and availability of boat rental facilities.¹⁰ Casual fishing is commonly a family experience.

Table 3.7 presents profiles of the various sub-segments of fishermen.

The Kawartha Lakes have long been the most important pickerel waters in Southern Ontario. Unfortunately, the size and number of fish caught has become noticeably smaller in recent years, mainly because of angling pressure at times when the fish are most vulnerable.¹¹

The Provincial government has made some suggestions regarding the marketing of recreational fishing which are directly applicable to the development of the fishing industry in the study zone. These suggestions include attempting to:

- Alleviate the preference imbalance by encouraging people to fish for pan and bass fish species which have higher angling success rates than pickerel and greater capability to sustain fishing pressure;
- Develop the attractiveness of fishing in lakes other than those currently deemed most popular, possibly through encouraging greater participation in "boat-in" or "fly-in" fishing.¹²

The latter may be an unrealistic suggestion for the study zone as lakes which are large enough to land a float-plane are probably already road-accessed.¹³ These recommendations, however, are all sub-components of an attempt to change people's attitudes from those which stress "quantity" of fishing to those which emphasize "quality" of fishing in order to ensure proper management of the recreational resource base.

ENDNOTES

1. Licence Issuing Group of Ministry of Natural Resources. This data is based on extrapolations made by the Licence Issuing Group from data obtained from 1) 1970 Ministry of Natural Resources Report on Angling; 2) Ontario Recreation Survey, 1973-1974; and 3) an in-house report of the Ministry of Natural Resources, 1975. 1980 survey statistics of fishing activity have been collected by Ministry of Natural Resources but are not yet ready for release.
2. 1981 Fishing Summary of the Regulations, Ministry of Natural Resources.
3. Ministry of Industry and Tourism, comment by representative of the Tourism Development Branch (July 1981).
4. Mr. P. Smith, an interview with Mr. P. Smith, Fisheries and Wildlife, Ministry of Natural Resources, Lindsay District (June 1981).
5. R. Quinn, "Marketing and Development: How Do You Combine Them?", Tourism Development: Approaches for the Future, The Travel Research Association, February 1977.
6. Ibid.
7. Ibid.
8. Ibid.
9. Ministry of Industry and Tourism, comment.
10. R. Quinn, "Marketing and Development".
11. Mr. P. Smith, interview.
12. Ibid.
13. Ministry of Industry and Tourism, comment.

Camping

Camping has grown dramatically during the last decade. Traditional tenters and backpackers still remain and are growing in numbers; however, a whole new generation of campers who like to combine the enjoyment of the outdoors with the convenience and comfort provided by recreational vehicles is also evolving.¹ During the period from 1970 to 1977, the total number of tent and trailer sites in Canada increased by 97% whereas the number of campgrounds grew by 57%.² By 1980, there were over 2,000 campgrounds in Canada.³

A shifting age population, life-style modifications and changing recreational habits are significant factors inducing changes in current camping patterns. Campers have reacted to these factors by:

- Taking fewer tour camping vacations;
- Making fewer overnight camping stops;
- Staying longer at campgrounds;
- Seeking more amenities and recreational facilities at campgrounds;
- Acquiring permanent and/or seasonal recreational trailer sites at private campgrounds.⁴

Table 3.8 illustrates that with the exception of tent trailer ownership, growth in household ownership of camping equipment in Ontario has either been on par or exceeded that in other provinces. Overall, it is estimated that 24% of Ontario households and 27% of Canadian households own some form of camping equipment.

Table 3.9 outlines four distinct market sub-segments associated with camping activity and Table 3.10 states their particular requirements for various tourism activities and services. Common to all is a desire for

TABLE 3.8
HOUSEHOLD OWNERSHIP OF CAMPING EQUIPMENT
IN CANADA AND ONTARIO, 1971 TO 1980

<u>Equipment</u>	Compound Average Annual Growth Rate	Overall Increase 1971 to 1980	Percentage of Households 1971	Percentage of Households 1980
	(%)	(%)		
<u>All Equipment</u>				
Canada	9.1%	100.9%	18.0%	27.0%
Ontario	9.3	103.1	16.0	24.0
<u>Tent Trailers</u>				
Canada	4.6	43.4	4.0	4.0
Ontario	2.4	21.3	4.0	4.0
<u>Tents</u>				
Canada	8.6	94.6	12.0	17.0
Ontario	10.1	116.4	10.0	17.0
<u>Travel Trailers</u>				
Canada	12.6	158.9	2.0	4.0
Ontario	12.2	151.4	2.0	3.0
<u>Truck Campers</u>				
Canada	15.4	213.7	1.0	3.0
Ontario	16.3	235.3	0.8	2.0

Source: Statistics Canada, Catalogue #87-001

TABLE 3.9
DEFINITION OF CAMPING ACTIVITY MARKETS

<u>Market Segment</u>	<u>Description</u>
Wilderness	No road access. May not be a designated area. No service.
Primitive	Road access. Sanitary services and fire sites only (campsites may not be designated).
Developed	Road access by good roads. Full camping services and some related activities.
Touring	Essentially, camping is a mode of accommodation.

Source: Quinn, R. "Marketing and Development: How Do You Combine Them?"
Tourism Development: Approaches for the Future, The Travel
Research Association, February 1977

TABLE 3.10
REQUIREMENTS OF CAMPERS - NATURAL RESOURCES AND BASIC SERVICES

<u>Camping Sub-Segment</u>	<u>Natural Resource</u>	<u>Service</u>
Wilderness	<ul style="list-style-type: none">● Large natural area, undisturbed by human influence - complete wilderness● Not readily accessible	<ul style="list-style-type: none">● Services undesired
Primitive	<ul style="list-style-type: none">● Isolated location● Road access, widely spaced campsites	<ul style="list-style-type: none">● Limited services - campsites, sanitary and waste collection, fireplace sites
Developed	<ul style="list-style-type: none">● Convenient location● Desire for nature and beauty but not wilderness	<ul style="list-style-type: none">● Complete campground services● Facilities for other recreational activity
Touring	<ul style="list-style-type: none">● Convenient location	<ul style="list-style-type: none">● Full services● Assurance of availability of site

Source: Quinn, R. "Marketing and Development: How Do You Combine Them?"
Tourism Development: Approaches for the Future, The Travel
Association, February 1977

natural beauty; however, the importance of a wilderness component or the sophistication of service vary depending upon the experience sought.

The Peterborough-Haliburton Tourism Zone is one of the most popular camping areas in Ontario. Victoria and Peterborough Counties account for close to 10% of the campground capacity in Southern Ontario.⁵ Approximately 80% of the zone's estimated 18,000 campsites are privately owned and operated.

Table 3.11 provides a profile of Provincial Park campers within the study zone. The figures presented are significant in that the 500,000 camper-nights generated in provincial parks located in the zone represent traffic from only 20% of the campsites within the Peterborough-Haliburton Tourism Zone.

The core amenities currently required at developed campsites include the following:

- Swimming area in the form of a beach or a pool;
- Three-point hook-ups: water, electrical and sewage;
- Washroom and shower facilities;
- Laundry facilities;
- Grocery stores.⁶

However, as the trend for longer stays at one campsite becomes more firmly entrenched, campers will expect more basic amenities, recreational activities and organized programmes to be available to them.⁷ These "resort campgrounds" will be expected to offer the following in addition to the basic amenities:

- Children's playgrounds;
- Recreation buildings;
- Organized recreational and social events.⁸

TABLE 3.11
PROVINCIAL PARK CAMPER PROFILE
PETERBOROUGH-HALIBURTON TOURISM DEVELOPMENT ZONE

- 64.5% of camper groups were mixed adult and youth groups;
- The average party-size was 3.6 persons;
- 55.4% were between the ages of 15 and 44 years;
- The proportion of males to females was approximately equal;
- 52.7% were first-time users of the particular park they were in;
- The average length of stay was 2.8 nights;
- 89.4% were Ontario residents; 1.4% Other Canadians, 3.8% Americans, and 1.4% Overseas visitors;
- 37.1% were on weekend trips and 59.5% were on annual vacation trips;
- For 59.1% of the campers, the park was their main destination.

Source: Provincial Park Camper Survey, Summary Statistical Reports, 1977 to 1979, Outdoor Recreation Group, Parks and Recreational Areas, Ministry of Natural Resources

In Southern Ontario there has been an overall growth of approximately 5% in the number of seasonal campsites between the years 1977 and 1979.⁹ Although the percentage of seasonal campsites has not changed significantly from 1976 (19%) to 1979 (20%), 52% of all campgrounds had seasonal sites in 1979 compared with 47% in 1976.¹⁰

Timesharing campgrounds are relatively new phenomenon in the traditional campground industry. When applied to campgrounds, timesharing usually means that individuals own or have pre-arranged rights to use a campground at a particular time of the year.¹¹

The campground operators in the Peterborough-Haliburton Tourism Zone must be prepared to offer a diverse range of sites and facilities in the future. Smaller cars and trailers and increased uses of tent trailers and tents may reduce the average size of site required. However, operators must simultaneously anticipate demand for larger sites to facilitate the longer-term, larger motor homes.¹²

ENDNOTES

1. Planning Canadian Campgrounds, Industry Development Branch, Canadian Government Office of Tourism, 1980.
2. Inntrec Group Incorporated, A Perspective of Canada's Private Campground Industry, 1980.
3. Gilles Ruest and Associates, Timesharing as it Relates to Tourism Development In Canada, May 1980.
4. Inntrec Group, Canada's Private Campgrounds.
5. J.D. Ross and G.D. Driscoll, Analysis of Outdoor Recreational Supply in Ontario with a Summary of Recent Trends, April 1980.
6. Inntrec Group, Canada's Private Campgrounds.
7. Ibid.
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10. Ibid.
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12. Ibid.

Windsurfing

Windsurfing made its entrance into the Canadian recreation market during the 1970's. However, primarily because of the Canadian climate, its acceptance to date has not been as rapid as in the United States or Europe.¹

There are approximately two dozen major windsurfer suppliers in Canada to serve the 10,000 person Canadian market projected for 1981. The 65 retail windsurfer dealers in Ontario sold over 4,000 boards in 1980.²

Windsurfing has the attributes of most "growth" sports in that it can be done on an individual basis; it can be performed in a relatively short and/or flexible time frame; it has low after costs besides maintenance and upkeep; and it is a sport which can be performed by most age groups and both sexes.³

The major windsurfing centres in Ontario are centred around Toronto, Collingwood and the Muskokas. Access to the waterfront is the major requisite in establishing windsurfing centres. However, as the sport matures, additional services such as storage racks, clubhouses and on-premise instructors will be required. These can all be provided in conjunction with existing marina facilities in the study zone.

A major impetus to future worldwide growth is windsurfing's inclusion as an Olympic activity in 1984. Olympic status will add a new dimension of worldwide respect to a sport and recreational activity which is in its infancy relative to other water-oriented activities.

ENDNOTES

1. Mr. D. Ross and Mr. A. Jones, an interview with Messrs. Ross and Jones, Windsurfing International (June 1981).
2. Ibid.
3. Sailboards - Suppliers Surge into Latest Growth Market, an article to the industry, May 11, 1981.

Cross-Country Skiing

Cross-country skiing is one of the fastest growing recreation activities in Canada. Approximately 23% of Canadian households owned cross-country skis in 1980 compared to 17% in 1978.¹ In Ontario, 581,000 households owned cross-country skis in 1980. Household ownership of cross-country skis evidenced a compound average growth of 24% between 1978 (when 377,000 households owned cross-country skis) and 1980. Ontario's cross-country skiers represent approximately 27% of Canada's total cross-country skiing population.²

The rising popularity of cross-country skiing is attributed to:

- Availability of inexpensive imported cross-country skiing equipment;
- Relatively low cost and ease of access to facilities;
- A shift in participation by alpine skiers because of problems associated with downhill skiing (e.g. expense, crowding, distance to facilities);
- Favourable attitudes stemming from "back to the land" and fitness movements;
- A possible "fad" component spurred by high levels of promotion;
- Ease of learning the sport;
- Suitability of climate and topography in much of Ontario.³

Diminishing land availability for the development of trail systems and increasing costs of energy, transportation, operation, land acquisition and development are factors which could, however, curtail growth.⁴

The cross-country skiers of the future will increasingly be represented by the middle and older age groups as the Canadian age population structure continues to change. Recent surveys indicate that cross-country skiers are relatively older than downhill skiers. Approximately 15% of cross-country skiers are 45 years or older compared to 7% of downhill skiers.⁵

The cross-country skier desires early snowfall and a continuous accumulation of new snow, a good mixture of flat and rolling terrain, scenic areas for skiing, groomed and varied trail systems, protection from the wind and, in some cases, rental equipment.⁶

Cross-country skiers are willing to travel relatively long distances when the destination is perceived to offer a high quality skiing experience. Therefore, although there has been an increased appreciation for cross-country skiing in urban areas, it is possible that skiers from urban centres can be encouraged to travel to more rural settings if unique skiing experiences are offered. Individual groups average 10 to 15 trips per season to various areas in Ontario.⁷

Many existing cross-country skiing facilities and/or areas are of poor quality and inadequate in terms of the challenge offered to skiers.⁸ Because costs of development and operation are increasing, existing and future resources must be better planned, designed and maintained to allow increased and more varied use.

Potential exists in the study zone, particularly in the northern regions around Haliburton, Bancroft, Barry's Bay and Whitney, for further development of hut-to-hut cross-country skiing experiences such as that which exists in Algonquin Park. "Hut-to-hut" skiing allows the cross-country skier to travel long distances over an extended period of time without having to travel repeatedly over the same trails. Tents/resorts available at designated points along the route provide facilities for overnight accommodation and meals. Two development concepts are possible. One, which is popular in the Adirondacks, involves skiing from one resort to another. The resort operator or his

designate is responsible for transporting the skiers' gear to the next resort en route. The second involves the placement of wooden tent platforms at distances of 15 to 20 kilometres. Insulated tents with wooden walls are erected at the designated locations. Skiers are responsible for moving their own packs from one location to the next. Cross-country ski packages built around this concept may involve any length of time from one to seven days. Such developments would be instrumental in drawing ski clubs and skiers from Quebec and other parts of Canada, United States and Europe, who would not otherwise be inclined to visit the area for extended periods of time.

Table 3.12 provides a profile of the Ontario cross-country skier.

Growth in participation in cross-country skiing is projected at 7% to 10% annually.⁹ The continued growth in appreciation for this activity points to the need for development of new and improved cross-country skiing areas throughout Ontario.

TABLE 3.12
PROFILE OF THE ONTARIO CROSS-COUNTRY SKIER

- 58.4% are male;
- 51.2% are married;
- 65.4% are 34 years of age and under, average age is 30 years;
- 84.3% have high school education or higher;
- 48.9% are employed; 32.4% are students;
- 50% skied 1 to 10 times in the previous season;
- 20% skied more than 20 times in last season.

Source: Ontario Recreation Survey, 1977.

ENDNOTES

1. Statistics Canada Service Bulletin: Culture Statistics, Table I, April 1981.
2. Survey of Fitness, National Health and Welfare, Physical Recreation and Sport, October 1976.
3. "SMART Survey Indicates Restrained Growth for Ski Industry in Next Three Years", in Ski Industry Bulletin, March 1981 and P.F. Wilkinson and R.S. Lockhart, The Winter Use of Urban Parks.
4. Ibid.
5. Feasibility Study for Cross-Country Skiing Based Tourism, Canadore College, 1976.
6. Ibid.
7. Ibid.
8. P.F. Wilkinson and R.S. Lockhart, Winter Use.
9. SMART Survey, Ski Industry.

Snowmobiling

Canadian household ownership of snowmobiles has experienced a compound average annual growth of 6.4% during the period 1971 to 1980.

Approximately 10% of Canadian households currently own one or more snowmobiles.¹ The number of Ontario households owning snowmobiles has increased by approximately 5.8% per year, growing from 166,000 households in 1971 to 276,000 in 1980.²

In 1967, the Ontario Federation of Snowmobile Clubs consisted of 11 clubs. By the early 1970's, this had grown to 265 clubs comprised of 12,300 families, or 48,000 individuals.³ Since the 1970's, the number of clubs has remained constant although membership continues to grow.

Snowmobiling has an endless variety of experiences to offer both as an activity in itself and as an integral component of many ice fishing experiences. The result is an increasing demand for new trails and facilities to be opened and improved. In its infancy, snowmobiling was engaged in on virtually any vacant land. As the sport has matured, however, preferences and regulations have increased demand for the development of designated snowmobile trail systems.

Snowmobilers are most attracted to terrain which affords a combination of hilly, wooded and unwooded lands. Such conditions offer a varied and challenging experience to participants. The Peterborough-Haliburton Tourism Zone has an abundance of such snowmobiling trails and, consequently, rivals the Barrie area with respect to its popularity as a developed snowmobiling region.

Amenities which enhance the pleasure and convenience of snowmobilers include the following:

- Standardized snowmobile directional signs and symbols placed along trails (their presence is currently an indication of trail quality);

- Spur (side) trails to towns or service facilities (e.g. restaurants, lodges, gas stations, ice fishing spots);
- Cooking shelters, warming shelters and camping facilities;
- Parking for cars and snowmobile trailers;
- Maps indicating environmentally fragile areas, hills, swamps and private property which should be avoided;
- First-aid and emergency facilities.⁴

The rising popularity of more extensive snowmobiling routes may be partially attributed to the evolution of Sno-1, a 500-mile double-tracked trail which passes through the study area at Lindsay, Bobcaygeon and Fenelon Falls. A recent announcement by the Ontario Government to discontinue the Winter Trails Programme will likely bring the user-pays concept into being sooner than expected. It will also, ultimately, mean the demise of some snowmobiling organizations.

These long trails aid winter tourism by providing opportunities for further development in the food, beverage and accommodation sectors. Currently, many resort/hotel operators encourage weekend participation by offering special discount rates to snowmobilers. Further, the existence of such trails which link the Quebec, Manitoba and Ontario borders and lead as well to trails in the northern U.S.A., creates opportunities for the Peterborough-Haliburton Tourism Zone to expand its markets.

Competitive snowmobiling generates additional market segments. The study area is the home of the annual STP Kawartha International Snowmobile Races. In 1982, STP Kawartha is expected to bring 30,000 to 40,000 spectators to the zone.⁵ As increasing numbers of snowmobilers begin to demand more opportunities to improve their skills, it is possible that similar races on a smaller scale could be run throughout the winter season in much the same manner as sailors have regattas.

Table 3.13 provides a profile of snowmobiling participants in Ontario.

TABLE 3.13
PROFILE OF SNOWMOBILERS IN ONTARIO

- 56% are males;
- 52.1% are married;
- 71.6% are 34 years of age or younger, average age is 28 years;
- 76.4% have high school education or higher;
- 45.8% are employed, 31.3% are students;
- 18.0% of the population participated at least once in the previous year.

Source: Ontario Recreation Survey, 1977.

ENDNOTES

1. Statistics Canada, Catalogue #87-001, Table 1, Vol. 4, No. 3.
2. Ibid.
3. D. Shaw, Snowmobiler User Attitude Survey, Ryerson Polytechnical Institute, March 1980.
4. Ibid.
5. Mr. J. Robinson, interview with Mr. J. Robinson, STP Kawartha International Snowmobile Races, May 1981.

Hunting

During the mid-1960's approximately 250,000 big game licenses were sold annually in Ontario. This number has since declined to approximately 95,000 hunters per year because regional depletion of the natural resources on which this industry depends has resulted in shorter and/or closed seasons in certain areas, a deliberate reduction in non-resident seasons and large increases in non-resident license fees in addition to the introduction of other regulations designed to reduce the big game harvest.¹

Since 1971, approximately 85,000 deer hunting licenses have been sold annually to Ontario residents. Non-resident demand (approximately 5,000 to 10,000 non-residents annually) has also remained steady during this period.² Lack of significant market growth is attributed to the following factors:

- Increased costs of resident and non-resident license fees;
- Reduced deer population;
- Decline in areas accessible to hunters;
- Restrictions on the use of dogs (a popular form of hunting);
- Lower success levels among deer hunters;
- Failure to implement wildlife management programs when it was apparent the resource was under stress.³

Table 3.14 presents deer hunting patterns for the Peterborough-Haliburton Tourism Zone in 1978 and 1979.

Sales of licenses to moose hunters display a similar pattern, levelling off at between 80,000 and 85,000 licenses per year. Annual harvests have

TABLE 3.14

DEER HUNT SUMMARY

1978

District	Residents				Non-Residents				All Hunters			
	Hunters #	Harvest #	Success %	Days of Recreation #	Hunters #	Harvest #	Success %	Days of Recreation #	Hunters #	Harvest #	Success %	Days of Recreation #
Bancroft	6,632	744	11.2	32,329	41	6	14.6	194	6,673	750	11.2	32,523
Minden	6,037	656	10.9	30,036	97	20	20.6	412	6,134	676	11.0	30,448
Lindsay	1,798	188	10.5	6,900	4	0	0.0	20	1,802	188	10.4	6,920
Simcoe	105	0	0.0	1,050	0	0	0.0	0	105	0	0.0	1,050
TOTALS	14,572	1,588		70,315	142	26		626	14,714	1,614		70,941
1979												
Bancroft	6,481	1,033	15.9	32,891	34	2	5.9	185	6,515	1,035	15.9	33,076
Minden	4,718	575	12.2	23,237	73	18	24.7	342	4,791	593	12.4	23,579
Lindsay	1,649	234	14.2	7,247	0	0	0.0	0	1,649	234	14.2	7,247
Simcoe	469	42	8.9	3,583	0	0	0.0	0	469	42	8.9	3,583
TOTALS	13,317	1,884		66,958	107	20		527	13,424	1,904		67,485

Source: Data printouts from the Ministry of Natural Resources

remained constant at approximately 13,000 animals per year in Ontario,⁴ a figure which is approximately 35% lower than that reported 15 years ago.⁵

Approximately 400,000 small game licenses are sold annually. This represents a decrease of close to 60,000 licenses compared to 1968.⁶

Bear hunting is the only hunting activity in which more non-residents than residents are involved. Approximately 10,000 non-resident and less than 5,000 resident bear licenses are sold annually.⁷

The following are the integral components of the hunting experience which high quality hunting operations generally provide;

- Guided services;
- Knowledgeable/helpful staff at the camp/lodge;
- Recreational facilities at the lodge;
- An atmosphere of isolation and wilderness.⁸

It is unreasonable to expect further development of the hunting industry until wildlife populations are sufficient to ensure relatively high success rates. Careful planning among land developers, agriculturalists and wildlife conservationists is required to ensure that the study zone retains its natural resource base for hunting. The success of resource management programmes ultimately depends upon:

- The ability to tailor resource management programmes to meet specific local needs;
- An appreciation of the industry's contribution to local economies;
- Effective enforcement of the regulations.⁹

Profiles of the various types of hunter market segments are presented in Table 3.15.

TABLE 3.15
PROFILE OF BIG GAME, SMALL GAME, AND WATERFOWL
HUNTERS IN ONTARIO

<u>Big Game</u>	<u>Small Game</u>	<u>Waterfowl</u>
● 89.9% are males;	● 90.6% are males;	● 93.5% are males;
● 75.4% are married;	● 57.3% are married;	● 65.0% are married;
● 51.8% are 34 years of age or younger - average age is 36 years;	● 66.4% are 34 years of age or younger - average age is 31 years;	● 62.6% are 34 years of age or younger - average age is 32 years;
● 71.1% have high school education or greater;	● 75% have high school education or greater;	● 82.5% have high school education or greater;
● 73.8% are employed, 10.5% are students;	● 63.6% are employed, 21.8% are students;	● 66.8% are employed, 18.0% are students;
● 4.2% of Ontarians participated at least once in previous year.	● 9.2% of Ontarians participated at least once in previous year.	● 3.7% of Ontarians participated at least once in previous year.

Source: Ontario Recreation Survey, 1977.

ENDNOTES

1. Mr. J. Barbowski, interview with Mr. J. Barbowski, Wildlife Branch, Ministry of Natural Resources (June 1981).
2. The Fishing and Lodging Industry in Northern Ontario, Ministry of Natural Resources, January 1979.
3. Ibid.
4. Ibid.
5. Moose Management in Ontario: Problems and Possible Solutions, Ministry of Natural Resources, September 1979.
6. The Fishing and Lodging Industry.
7. Ibid.
8. Ibid.
9. Ibid.

Bus Tours

Growth in the appeal of bus tours is evident from current American data which reports an overall increase of 18.5% in the number of Americans who travelled on bus tours, from 162 million passengers in 1977 to 192 million passengers in 1980.¹ This represents a compound average annual growth of 5.8% during this period. However, only 0.7% of all American tour bus passengers took a chartered trip to Canada in 1980.² This percentage has been constant throughout the past several years and is expected to remain so, although the absolute number of trips to Canada will increase at the same rate as the number of trips to all destinations.

It is believed that the Canadian bus tour market is experiencing similar gains in popularity. While only an indication of proposed bus tours, the information in Table 3.16 implies that Canadian tour operators have perceived a growing demand for bus tours and have reacted by planning more trips than in previous years. The statistics also indicate that the largest market is in Ontario where 32.6% of total proposed bus tours were originated.

At the present time, there is a very limited number of bus tours destined specifically to the Peterborough-Haliburton Tourism Zone. The most notable is "Autumn in the Kawarthas" run by Gray Coach from Toronto. This type of trip appeals to more passive-oriented adults and senior citizen groups.

The majority of bus tours which originate in Toronto are "pass-through" tours en route to Ottawa, Northern Ontario or Montreal. It is because of the perceived undersupply of nationally and internationally significant attractions that major motor coach companies are reluctant to schedule other than day trips to the zone. A major concern voiced by tour operators is that travellers equate their desire to visit specific

TABLE 3.16
PROPOSED TOURS BY CANADIAN TOUR BUS OPERATORS

	<u>1980</u>		<u>1979</u>	
<u>Origin of Tours</u>	<u>No. of Tour* Operators</u>	<u>Proposed No. of Tours</u>	<u>No. of Tour* Operators</u>	<u>Proposed No. of Tours</u>
Atlantic Provinces	27	41	23	27
Quebec	37	123	25	52
Ontario	57	196	60	177
Saskatchewan/Manitoba	24	22	20	23
Alberta/Northwest Territories	69	85	65	95
British Columbia/ Yukon	<u>78</u>	<u>134</u>	<u>72</u>	<u>97</u>
TOTALS	<u>292</u>	<u>601</u>	<u>265</u>	<u>471</u>

* Number of tour operators as presented above is greater than the actual numbers of 176 in 1979 and 182 in 1980 due to double recording of those tour operators who offer tours in more than one province.

Source: CGOT Package Tour Index

destinations with the prestige associated with having been to these locations.³ Travellers also desire a wide variety of attractions set in both rural and urban environments.⁴

Interest does exist among several market segments for visiting an area which offers amenities similar to those available in the study zone. An increasing number of senior citizens, primarily from Toronto, have shown an interest in taking bus tours for one or two days during mid-week or off-season when it is possible to take advantage of discounted rates.⁵ Such groups are motivated by the opportunity to "escape" from the city, socialize, sightsee and participate in outdoor recreational activities such as boating, fishing and walking.⁶

Special interest groups including cross-country skiers, photographers, church, youth and school groups are additional sources of growth for the tour bus market.

Viewing scenery, landscapes and historically and culturally significant sites is very much a part of the total experience provided by a bus tour and Americans are especially intrigued by opportunities to see rural areas of Canada.⁷

Opportunities also exist for extending the length of the bus tour season to include early spring and late fall. Charter bus operators in Toronto have responded to the criticisms voiced by patrons who do not enjoy crowded summer highway traffic, travelling in the heat or standing in lines to see attractions by providing tours to areas such as the Peterborough-Haliburton Tourism Zone during the shoulder seasons.⁸

Among the factors used by Canadian tour group operators in choosing appropriate areas for tours are:

- The presence of sufficient resources, facilities and activities to attract diverse groups of people;

- The availability of accommodation and food and beverage industry sectors which have the capacity to handle large groups of people;
- The presence of a unique tour which will be remembered as distinct from other activities;
- The existence of demand for travel to a specific destination.⁹

The success in increasing the bus tour business in Peterborough-Haliburton will ultimately depend upon:

- Co-operation among the principal parties involved in the industry to enhance the image of the study zone;
- Collaboration among the various hotel/resort, restaurant and attractions operators to devise imaginative packages which tie together, in a novel fashion, the many features in the zone;
- Promotion of the study zone as one which offers diverse activities and attractions to all age groups;
- Continually upgrading existing facilities, events and attractions to meet current market requirements;
- Anticipating and expanding to meet future requirements.

ENDNOTES

1. Mr. H. Morgan, interview with Mr. H. Morgan, Research Department, American Bus Association (June 1981).
2. Ibid.
3. Mr. A. Howe, interview with Mr. A. Howe, Supervisor, Travel Trade Services, North American Market, Ministry of Industry and Tourism (June 1981).
4. Mr. H. Morgan, interview.
5. Mr. A. Fagan, interview with Mr. A. Fagan, Supervisor, Travel Trade Services, Overseas Market, Ministry of Industry and Tourism, June 1981.
6. Mrs. J. Armeneo, interview with Mrs. J. Armeneo, Tourism and Convention Bureau, Peterborough Chamber of Commerce, June 1981.
7. Mr. H. Morgan, interview.
8. Interview with manager, Escape Tours, Toronto, June 1981.
9. Mr. A. Howe, interview.

Overseas Visitors

Spurred by a desire to gather new impressions, meet new people and gain new experiences, the number of overseas visitors to Canada has increased from 930,000 in 1973 to 1.7 million visitors in 1979.¹ This represents a compound average growth of 10.6% during that period. Growth is projected to remain constant at a more moderate level of 5% to 6% per annum for the next three to five years.²

Overseas residents made approximately 554,100 person-trips to Ontario in 1978.³ Their trips to the Peterborough-Haliburton Tourism Zone, however, account for less than 1% of total visitation to the area from all destinations.⁴ West Germans and Great Britons are the most inclined of overseas markets to visit Ontario. Approximately 64.1% and 61.5%, respectively, of their total visits to Canada are destined to Ontario. France, the Netherlands and Japan are other major geographic areas from which travel is derived.

Generally, outstanding scenery, wide open spaces, outdoor activities and a quiet unspoiled environment are key factors in generating travel to Ontario.⁵ These are among the most marketable aspects of the Peterborough-Haliburton Tourism Zone and, therefore, should be highlighted in travel literature sent to overseas travel agents.

Overall, overseas visitation to Canada has expanded as a consequence of the following factors:

- The evolution of skill-improving vacations which involve tennis, sailing, scuba diving, horseback riding and houseboating;
- Ease of obtaining passports for Canadian travel;
- The strong family ties which exist due to post-war immigration;
- The decline of the Canadian dollar with the accompanying increased purchasing power of foreign currencies;

- Perceptions of Canada as a politically stable country.⁶

Obstacles to large-scale growth are present at both the broader Canadian and Ontarian levels and include the following:

- Canada is seldomly perceived as a place to enjoy shopping and entertainment; rather to many potential overseas visitors, Canada is perceived as being too far away, too large, too expensive, dull and lacking in sunshine;
- Canadian surface transportation, buses and trains, are not considered equal to European standards;
- There is a need for more rental camper vehicles and better quality guest ranches, houseboats and vacation farms which are favoured by many Europeans;
- Industry operators will not commit themselves to price and space far enough in advance and incentives to foreign travel agents are poor;
- The U.S.A. is a primary competitive force in that it is often perceived as being similar to Canada, yet it offers lower trans-Atlantic and U.S. domestic airfares, has higher seat availability for transportation and engages in more extensive advertising.⁷

Demographic segmentation indicates that the largest proportion of overseas travellers are 34 years old or younger. In addition, the majority of overseas visitors travel either as couples or individuals; family travel is not prevalent.

The Peterborough-Haliburton Tourism Zone should not expect extensive extended visitation by overseas visitors. Day visits or one to three-day trips are probably more characteristic of these travellers who are motivated to see as much of the country as possible during their stay in Canada which generally averages about two weeks.⁸

ENDNOTES

1. CGOT, Overseas Marketing Reports, 1979.
2. Mr. G. Taylor, interview with Mr. G. Taylor, Canadian Government Office of Tourism (April 1981).
3. CGOT, Overseas Marketing Reports, 1979.
4. Tourism Statistical Handbook, 1979, Tourism Market Analysis Section, Ministry of Industry and Tourism, May 1979.
5. CGOT, Overseas Marketing Reports.
6. Ibid.
7. Ibid.
8. Ibid.

Small Conferences/Meetings

Companies who choose to hold seminars, sales conferences, incentive meetings, training sessions, etc. in resort areas represent another potential market segment for the Peterborough-Haliburton Tourism Zone. Recent statistics indicate there were approximately 21,000 meetings held in Ontario in 1978. This represents an increase of approximately 10% per year over the previous three years.¹

In the Central Ontario Travel Association area, which includes the Peterborough-Haliburton Tourism Zone, guest room revenues from conventions and corporate meetings jumped 32.1% between 1976 and 1978, from \$845,000 to \$1.2 million.² The Central Ontario Travel Association area has a 4.0% share of Ontario's corporate meetings market.³

Overall there have been relatively few new properties added to the supply of conference facilities throughout Ontario, although the last five years have seen many expansions to existing resorts and motor inns.⁴ Physical expansion and/or upgrading is a viable means by which resorts and hotels in the study zone may enter this market. Currently, only 15, or 8.8%, of existing hotels and resorts in the area have made provision for meetings or conferences.

After a decision is made to hold the meeting in either an urban or non-urban setting, there are a number of relatively inflexible factors which govern the choice of destination. Table 3.17 presents various factors found to be important according to a recent survey of Ontario conference co-ordinators.⁵

The Peterborough-Haliburton Tourism Zone is well-suited to meet the needs of the incentive trips market. Both the aesthetic appeal and the availability of recreational and sporting facilities in the study zone are natural attractions for such a market. Not only can the study zone accommodate this market in terms of supplying opportunities for golfing, swimming, boating and sightseeing, but it is also reasonably proximate to

TABLE 3.17
FACTORS CONSIDERED VERY IMPORTANT IN
THE SELECTION OF DESTINATION SITE
FOR SMALL CONFERENCES/MEETINGS

	<u>Corporate Planners</u>	
	<u>All types</u>	<u>Incentive Trips</u>
Availability of hotels or other facilities suitable for meetings	70%	61%
Ease of transporting attendees to and from location	62%	40%
Distance from individual attendees' residences	42%	23%
Transportation costs	38%	32%
Climate	32%	65%
Availability of recreational facilities such as golf, swimming, tennis, etc.	23%	68%
Sightseeing, cultural, other extra-curricular attractions	9%	68%
Glamorous or popular image of location	8%	58%

Source: Laventhol & Horwath, Market Study Up-Date, March 1981

major markets (e.g. Toronto) and a major airport (e.g. Toronto International Airport). Conference co-ordinators indicate a preference for meeting locations which do not exceed a distance of 150 miles from commercial centres or head offices. The study zone is within these limits for companies whose head offices are located in cities such as Toronto, Hamilton and Oakville, all of which are active in the meetings market.

The popularity of resorts as suitable locations for conferences has risen steadily since 1976. Several factors may explain this:

- An increasing tendency to meet away from densely populated areas;
- A greater tendency to rotate the location of meetings from year to year;
- An overall increase in the incidence of small meetings.⁶

Once the destination has been chosen, other factors are considered before a specific hotel or resort is selected, including the following:

- Quality of foodservice;
- Number, size and calibre of meeting rooms;
- Number, size and calibre of sleeping rooms;
- Availability of meeting support services;
- Previous experience in dealing with a facility and its staff;
- Availability of on-site recreational facilities.⁷

Criticisms voiced against conference/meeting facilities in general include:

- Lack of understanding of specific needs of conferences;
- Availability/scheduling;

- Lack of facilities capable of providing both quality service and facilities.⁸

In order for the Peterborough-Haliburton Tourism Zone to capture a larger share of the small conferences/meetings market, conference facilities should incorporate the following into their operations:

- A degree of flexibility in terms of scheduling meeting rooms;
- Increased promotion of the services and amenities offered by the facility;
- Professional design of facilities to ensure comfort;
- An emphasis on all aspects of service relating to both meeting and hospitality requirements.⁹

ENDNOTES

1. Laventhol & Horwath, Market Study Update, Cantrakon Glen-Abbey Conference Centre, March 1981.
2. Ontario's Revenue from Conventions, Corporate Meetings and Travel Trade in Ontario, 1977-1978, Tourism Marketing Information Services, Ontario Ministry of Industry and Tourism, April 1980.
3. Ibid.
4. Laventhol & Horwath, Market Study Update.
5. Ibid.
6. Ibid.
7. Ibid.
8. Ibid.
9. Ibid.

Resort Timesharing

Resort timesharing is a form of prepaid vacation whereby a buyer purchases or leases a vacation accommodation unit for a pre-determined period in each year. Having an annual growth of approximately 50%, resort timesharing represents one of the fastest growing real estate market segments in the world.

Canada adopted the timesharing concept in the late 1970's after witnessing its unprecedented growth in Europe, South America and the U.S.A. Timesharing is believed to be a viable real estate mechanism which minimizes long-term financing problems normally associated with new construction projects and allows high profit margins for existing hotels or properties which can be converted in part or in whole to timesharing.¹

There are currently 16 timesharing projects in Canada and 30 to 40 more developments across Canada are being planned. Each project is offered on a four-season basis. The estimated number of accommodation units on the Canadian market amounts to 400, or approximately 20,000 unit-weeks. Approximately 4,000 unit-weeks had been purchased by May 1980.² Canadian prices vary between \$1,500 and \$7,000 per unit-week depending upon location, resort quality and time of year.³ Most Canadian timesharing projects are located in established resort areas.

Table 3.18 presents a profile of the typical American timeshare buyer and a description of timesharing units which have been purchased. It is believed that such data can also be applied to the Canadian buyer. Stated user motivations for becoming involved with timesharing include:

- A definite saving on future vacation costs;
- The possibility for trading units through an exchange network;
- Guaranteed accommodation;

TABLE 3.18
PROFILE OF AMERICAN TIMESHARERS

Profile

- Two-thirds are married couples with children;
- 1% are less than 25 years of age, 18% are over 55 years;
- 6% are single men or women;
- 50% are college graduates, 75% have completed high school;
- 25% have incomes under \$25,000, less than one-third have incomes over \$35,000;
- The majority have four or more weeks of annual vacation;
- Approximately 75% live within 250 miles of their timeshare location.

Description of Timeshare Units Which Have Been Purchased

- 66% bought studio or single apartments, 34% bought two-bedroom apartments or larger;
- 42% bought in high season, 18% in low season, and 40% in shoulder season;
- 53% bought a one-week period, 37% a two-week period, and 10% a three-week period or longer;
- 4% purchased in more than one location.

Source: Ragatz, R.L., Resort Timesharing Council of American Land Development Association, 1978

- Limited management problems;
- The user buys only what he needs;
- Unit-weeks purchased in good locations tend to appreciate in value when sold;
- The user can generally lease his unused time;
- Purchase prices are relatively modest because the construction costs are spread among many buyers.⁴

Seasonality problems place constraints on the degree to which expansion of the timesharing market can occur within the study zone. Timesharing resorts must be located either in natural settings which permit year-round use or in areas which can surmount seasonal difficulties with innovative amenities and marketing programmes.⁵

The degree to which the seasonality issue will affect the Ontario timesharing industry depends upon the attitudes of the purchasers. If prospective buyers are primarily seeking a retreat, normal seasonality constraints will be of lesser significance because the opportunity to relax will be of major importance.⁶

Market segmentation suggests opportunities for alternative target markets in the off-season. During the spring and fall, retirees, sport fishermen and conventioners are all possible customers. During the winter season, cross-country skiing, snowmobiling and ice skating activities can be used to draw family groups or couples to the study zone.

To date, Canadian timesharing projects have not been accorded the receptivity received by projects in the U.S.A. or Europe. Only 20% of Canadian timeshare unit-weeks have been sold whereas Canadians have purchased approximately 20,000 unit-weeks in foreign timeshare projects, amounting to investments of close to \$100 million.⁷

Ontario faces particular difficulty in entering the timesharing industry since American, out-of-province and off-shore visitation do not constitute significant tourism markets,⁸ thereby precluding possible alternatives to the Ontario market. In addition, Ontario is entering an industry which has become very sophisticated and is characterized by increasing competition. As a result, sell-out time will increase, marketing costs will rise and consumers will become more discriminating.⁹

ENDNOTES

1. Gilles Ruest and Associates, Timesharing as it Relates to Tourism Development in Canada, May 1980.
2. Ibid.
3. Ibid.
4. Ibid.
5. Ms. B. Lamb, interview with Ms. Lamb, Timesharing International Incorporated (June 1981).
6. Ms. B. Spencer, interview with Ms. Spencer, Resort Timesharing Council of Canada (May 1981).
7. Gilles Ruest, Timesharing.
8. Timeshare International Incorporated, Market Feasibility Study and Timeshare Action Programme, March 1981.
9. Ibid.

SOCIETAL TRENDS AND FUTURE TOURISM DEVELOPMENT PROSPECTS

Future tourism development within the study zone will be influenced by a number of economic and social forces at work in Ontario, Canada and, to some degree, internationally. These evolving forces are associated with demographic, economic, employment, technological and lifestyle patterns. To a certain extent, they have already been felt in this region and will continue to frame its prospects.

Demographics

Canadians, most particularly Ontarians, represent the study zone's greatest resources and most important market. The population growth of Ontario is expected to decline during the next two decades. Its annual growth rate will decrease from 1% between 1981 and 1986 to 0.63% between 1991 and 1996.¹ Moreover, the population in Ontario, and generally in Canada, is aging. By the end of the century, the number of Ontario residents over the age of 65 will have nearly doubled. The number within the 45 to 64 age category will have increased by almost 70% and there will be both a relative and absolute decline in persons less than 20 years of age.² These older and more affluent market segments will demand and be willing to pay for a relatively higher quality of accommodation and services than is currently provided on a regular basis within the zone. The overall economic situation will, of course, determine the extent to which this is feasible.

Projections also indicate that household sizes are declining. There is an increasing number of households without children and there is also a dramatic growth in the proportion of alternate grouping households (e.g. not related by birth or marriage, single-parent families).³ This has implications for the type of activities and resources which will be sought by visitors to the study zone in the near future. For example, an aging population will seek relatively more passive forms of recreation (e.g. visiting historic sites, hiking, fishing) than will a market dominated by the youth.

Employment

Changes in working patterns and economic conditions will also affect the study zone's future tourism potential. Devalued Canadian dollars, energy price increases, world political events and shifts in consumer buying patterns have resulted in a substantial moderation of industrial growth throughout Canada and in Ontario. Simultaneously, the Canadian economy has experienced a shift from the goods-based orientation of the 1950's, in which less than half the total employment was in service industries, to the current service-based economy, in which the service sector accounts for approximately two-thirds of all employment.⁴ It is anticipated that the majority of all new jobs created over the next ten years in Ontario will be based in the service sector.⁵ The tourism industry, which is an integral component of the service sector, will benefit from this shift in emphasis. Training programmes should be designed to prepare potential tourism employees to work in the tourism industry.

Accompanying these trends will be continuing high levels of unemployment for youth, women and poorly educated members of the population, as well as an increased proportion of the working-age population involved in part-time employment. The relative proportion of women in the labour force will remain at about 40% through the 1980's.⁶ It is, therefore, important to devise and implement marketing strategies and tourism products capable of competing in tourism markets the size of which may be constrained by the foregoing factors.

Economy

Economic prosperity is not assured in the future. Long-term prospects for Ontario's economy are regarded as favourable, but a declining rate of growth is projected for this decade. While family incomes will be larger in the future, there will be a decreasing rate of increase in personal disposable income. Coupled with high levels of inflation and ever-escalating energy and food costs, constricted demand for tourism-related products and services will probably occur. These constraints

will probably be reflected in a demand for value in the tourist product, greater strategic planning in holiday destination decision-making, increased use of winter and shoulder season travel patterns, reduced trip frequency and increased length of stay during trips.

Lifestyle Patterns

Factors such as part-time employment, later entry and earlier exit, decreasing hours in the length of the work week and an increasing length of annual vacations, will all combine to increase time available for discretionary endeavours in tourism. However, the transfer of previously used work time into tourism-related pursuits may be less than direct. Undoubtedly future tourism demand will be restricted by both social value and prosperity constraints.

New values will gradually modify current decision making. Tourism developments which do not recognize and adapt to these values will probably be under-utilized. Studies suggest that there will be a decline in values related to materialism, capitalism and unqualified economic growth.⁷ In their place will be values emphasizing the quality of life, self-actualization, creativity, individualism and humanitarianism.⁸ Tourism experiences focussing upon an ecological ethic, interdependence, community and international brotherhood will be socially valued and will help to channel leisure in tourism directions.

Technology

Continued advances in technological innovation will characterize the next decade. These changes will translate into greater tourism opportunity awareness for the traveller and, consequently, an increased level of tourist destination competitiveness. Greater levels of comparison shopping for tourism experiences will occur. This will force the tourist operator to use more sophisticated and targeted forms of marketing and promotion in order to attract traditional, as well as, new markets.

Ontario's recently instituted accommodation grading programme will provide potential users with an objective means of comparing properties within each type. A four-star motel property in Bancroft will be within the same price range and offer the same level of services and amenities as a four-star motel in Jackson's Point. While such a programme will provide the potential user with a more objective means of comparison shopping, it will also encourage the operators to upgrade and maintain a particular product level.

Implications for Tourism Development

The societal trends summarized in this section suggest the potential and uncertainty associated with tourism development in this zone. Based upon these trends, it is imperative that certain strategies be implemented in order to establish a thriving industry. Their major implications for tourism development are summarized in Tables 3.19 and 3.20 which outline, briefly, factors sustaining and constraining tourism growth, respectively.

The variables discussed in the table are presented in decreasing order of their relative impact on the tourism-base of the zone.

On the basis of the foregoing discussion it is possible to recommend certain strategies which should be implemented in order to establish a thriving tourism industry. Tables 3.19 and 3.20 outline factors which sustain and constrain tourism growth, respectively. The variables discussed in the tables are presented in decreasing order of their relative impact on the tourism base of the zone.

TABLE 3.19
SOCIETAL TRENDS AND FUTURE TOURISM
DEVELOPMENT PROSPECTS
FACTORS SUSTAINING GROWTH

SOCIETAL TRENDS		IMPLICATIONS FOR TOURISM DEVELOPMENT WITHIN ZONE		DEVELOPMENT NEEDS WITHIN STUDY ZONE
Demographics				
Employment				
<ul style="list-style-type: none"> • Fastest growth in financial, public administration and service sectors through the 1980's. 		<ul style="list-style-type: none"> • Expanding potential labour supply for the tourist industry. 		<ul style="list-style-type: none"> • Training programs to permit potential tourism employees to gain ability to work in expanding tourism sector.
Economy				
Consumer Buying				
<ul style="list-style-type: none"> • Higher family incomes reflecting increased participation of family members in income generation. • Decrease in non-domestic Canadian travel due to exchange rates on Canadian funds. 		<ul style="list-style-type: none"> • Increasing potential for family-oriented tourism development. • Potential increase in winter and shoulder season Canadian travel markets. 		<ul style="list-style-type: none"> • Development of family-oriented travel products and services. • Development of winter and shoulder season tourist attractions. • Increase in provision of destination services and attractions to draw visitors to area. • Joint packaging of tourism experiences within travel zone.
Lifestyle Patterns				
Participation				
<ul style="list-style-type: none"> • Increased participation by Canadians in recreation, travel and health-building activities. • Increased participation in cultural pursuits. • Greater appreciation of activities and services which are energy and environment/conservation oriented. • Greater emphasis on activities closer to home. 		<ul style="list-style-type: none"> • Potential growth in outdoor recreation market. • Potential growth in domestic market share. • Increased interest in cultural and historic attractions. • Potential growth in day-use market. • Increased demand for nature appreciation activities. 		<ul style="list-style-type: none"> • Increase in outdoor recreation facilities for all seasons. • Provision of day-use attractions designed to generate income for surrounding tourist operations. • Provision of "participative"-oriented displays and facilities. • Preservation and promotion of local cultural and heritage resources.

TABLE 3.19
SOCIETAL TRENDS AND FUTURE TOURISM
DEVELOPMENT PROSPECTS
FACTORS SUSTAINING GROWTH
(continued)

SOCIETAL TRENDS		IMPLICATIONS FOR TOURISM DEVELOPMENT WITHIN ZONE	DEVELOPMENT NEEDS WITHIN STUDY ZONE
<u>Environment</u>			
<u>Awareness</u>			
<ul style="list-style-type: none"> • Greater levels of concern for the protection of the physical environment. • Greater appreciation of natural environment processes. 		<ul style="list-style-type: none"> • Development of dynamic nature interpretation centres. • Creation of nature-oriented tours and guide services. 	
		<ul style="list-style-type: none"> • Greater appreciation of environmentally-conscious tourism developments. • Increased demand for interpretive activities. 	
<u>Technology</u>			
<u>Awareness</u>			
<ul style="list-style-type: none"> • Increasing varieties and qualities of recreation activity. • Increasing availability of travel information. 		<ul style="list-style-type: none"> • Potential new market segments. • Increasing competition from new tourism developments. 	<ul style="list-style-type: none"> • Increased use of technological innovation in recreational equipment rentals. • Emphasis on development of enhanced image. • Increasing sophistication and penetration of promotional materials into the marketplace.

SOCIETAL TRENDS AND FUTURE TOURISM
DEVELOPMENT PROSPECTS
FACTORS CONSTRAINING GROWTH
(continued)

SOCIETAL TRENDS	IMPLICATIONS FOR TOURISM DEVELOPMENT WITHIN ZONE	DEVELOPMENT NEEDS WITHIN STUDY ZONE
Employment		
<ul style="list-style-type: none"> • Slower growth in employment (by 1.5% annually to 1989) for 1980's. 	<ul style="list-style-type: none"> • Decreased income growth for travellers. 	<ul style="list-style-type: none"> • Marketing strategies and tourism products capable of competing for limited tourism markets.
<ul style="list-style-type: none"> • Continuing high levels of unemployment for youth, women and poorly educated populations. 	<ul style="list-style-type: none"> • Conflicting vacation schedules resulting in demand for conveniently located mini-vacation areas. 	<ul style="list-style-type: none"> • Development of flexible vacation destination resort packages.
<ul style="list-style-type: none"> • Increase in proportion of the working age population involved in part-time employment. 		
Economy		
Consumer Buying		
<ul style="list-style-type: none"> • Decreasing rate of increase in personal disposable income (3.5% per year during the 1980's compared with 6.5% average of the 1970's). 	<ul style="list-style-type: none"> • Decreasing levels of income available for tourism spending on a per capita basis. 	<ul style="list-style-type: none"> • Demand for upgrading and improvement programs for tourism, rather than major capital expenditures on new developments.
<ul style="list-style-type: none"> • Continuing moderation in overall consumer buying power. 	<ul style="list-style-type: none"> • Product and service value will be a primary influence in tourism travel. 	<ul style="list-style-type: none"> • Product and service provision strategies which reduce the cost of travel to the consumer.
<ul style="list-style-type: none"> • Increased escalation in consumer price index. 	<ul style="list-style-type: none"> • Reduced frequency of trips. • Increase in one-destination travel holidays. 	<ul style="list-style-type: none"> • Improvement of pre-planning trip information systems.
<ul style="list-style-type: none"> • Increased escalation in food and energy costs. 	<ul style="list-style-type: none"> • Greater strategic planning in holiday destination decision-making. 	

SOCIETAL TRENDS AND FUTURE TOURISM

DEVELOPMENT PROSPECTS

FACTORS CONSTRAINING GROWTH

DEVELOPMENT NEEDS
WITHIN STUDY ZONEIMPLICATIONS FOR TOURISM
DEVELOPMENT WITHIN ZONE

SOCIETAL TRENDS

DemographicsPopulation Growth

- Declining population growth over the next two decades.

Population Composition

- Increase in the proportion of the Canadian population over 65 years of age from 9% to 12% by 2000.
- Decrease in the proportion of the Canadian population under 19 years of age from 33% to 27% by 2000.

- Slower growing domestic markets.

- Increased competition for decreasing availability of new markets.

- Changing attitudes and priorities toward older travelling markets.

- Increased government spending on retirement housing, recreation and services-oriented toward older citizens.

- Increased demand for passive-oriented tourism services and facilities accompanied with decreased demand for vigorous tourism activities.

- Increased demand for shoulder season tourism.

- Increased emphasis on marketing strategies, the goals of which are to encourage more international visitation.

- Increased supply of facilities and services designed for retirement markets.

- Increased supply of facilities and services capable of adopting a year-round operations orientation.

ENDNOTES

1. Tourism Development Strategy - Collingwood-Midland-Orillia Zone, Volume 1, 1980.
2. Ontario's Changing Population - Volume II - Directions and Impact of Future Change 1971-2001, 1975.
3. The Elora Prescription, 1979.
4. Tomorrow's Customers 1980.
5. Tourism Development Strategy - Collingwood-Midland-Orillia Zone, Volume 1, 1981.
6. Tomorrow's Customers 1980, 1981.
7. "Outdoor Recreation Trends In The 1980's: Implications For Society", Journal of Travel Research, Winter 1981.
8. The Elora Prescription, 1979.

SECTION IV
TOURISM DEVELOPMENT STRATEGY

TOURISM STRATEGY GOALS AND OBJECTIVES

Goals and objectives provide the launching point for the formulation of a tourism development strategy. They give direction to the diverse set of participants in the tourism industry and provide others who influence it with a better understanding of what it is about. In establishing the strategy for this study zone, certain goals and objectives have been used. They are based on the consultants' understanding and interpretation of the goals and objectives as outlined in the study's terms of reference; discussions with private sector representatives, tourism operators and government personnel; and the perusal of government planning reports associated with the study area. The recommended strategy is related to two over-riding goals.

- To identify specific tourism development investment opportunities of primary interest to the private sector.
- To detail a strategy whereby that potential may be attained.

To achieve these goals, opportunities and development strategies have been identified which relate to economic, environmental and social objectives of the zone in particular and the province in a general context.

Economic

The primary objective of this study is to provide private enterprise with a guide to the locations, opportunities and initiatives which will foster co-ordinated and economically successful tourism development on a year-round basis. In so doing, the development strategy also attempts to:

- Encourage private sector participation in decisions affecting the industry and in the development and operation of facilities and services for tourists;
- Foster a co-ordinated and cost effective approach towards the marketing and promotion of tourism both by the Tourist associations and the study area community at large through the identification of development opportunities which are complementary at both the local and study zone level;
- Strengthen and broaden the economic base of the study zone;
- Encourage more shoulder season and winter season tourism development through the identification of events, attractions and festivals unique to the season;
- Generate additional sources of income and job opportunities for the tourism and tourism-related industries which currently exist in the area;
- Create more diverse opportunities for employment in existing urban communities which are experiencing growth lags.

Social

Tourism development places considerable demand upon the social environment in which it occurs. To prosper over an extended period, private and public sector tourism development should strive to:

- Preserve the cultural and historical heritage of the area;
- Create a greater awareness of and access to the cultural and historical heritage of the area;
- Encourage the preservation of the skills of various local cultural groups;

- Encourage the development of visitor facilities which would also expand the recreational opportunities for residents;
- Create a greater awareness of the area's distinct regional identities.

Environmental

In order to sustain a high quality tourism experience with as broad a market appeal as possible over an extended period of time, the environmental resources of the area require certain safeguards. Therefore, tourism development opportunities for the zone should attempt to:

- Protect the rare and unique historical and cultural qualities of the area;
- Preserve the quality of the waterways in the area;
- Foster public understanding of the innate qualities of the area's biological and geological resource base;
- Protect the environmentally sensitive wildlife and flora units of the area.

PLANNING PERSPECTIVE

Tourism development within the Peterborough-Haliburton Tourism Zone is comprised of a wide mix of many kinds of public and private sector enterprises and programmes. They all relate in one form or another to attractions, services/facilities, transportation, information and specific types of tourists.

Numerous physical settings (e.g. Kawartha Lakes), establishments (e.g. Beehive Resort) and attractions (e.g. Peterborough Lift Locks), whether they be of a large or small scale, are the travel generators which bring visitors to the zone. These elements, no matter who provides, owns or operates them, stimulate not only site specific visitation but also encourage the use of continuous services and facilities.

Services and facilities provide the major tourism economic impact within the zone. Hotels, motels, food and beverage outlets, as well as other professional services and commercial retail outlets, all receive some and, in many cases, all their receipts from tourism spending. This situation is particularly true with establishments which only operate during part of the year.

Transportation linkages between tourist origins and destinations are crucial. While Provincial highways and the Trent-Severn Waterway supply auto and boat travel linkages to and within the zone, the potential significance of other linkage modes (e.g. cross-country skiing, hiking, snowmobiling, canoeing, kayaking and equestrian trails) should not be overlooked in the planning of tourist movement within the study zone.

As competition for the leisure dollar increases, effective communication will become more and more important as a means of drawing travellers to this tourism zone. Communication in the form of information and direction, about and within the zone, must be planned to include not only all forms of travel advertising, publicity and public relations, but also focussed images clearly portraying those attributes of the zone which will place it in the most advantageous competitive position.

Tourism developments must be planned to satisfy the needs of current markets and anticipate the desires of potential future markets. It is essential to understand people as tourists to prevent plans and programmes for tourism development from failing.

The preceding general planning principles lay the foundation for more specific development guidelines for tourism within this zone. These guidelines are related to land-use and marketing concerns.

Land Use

LOCATION

- More than any other development zone in Southern Ontario, tourism development in the study zone is dependent on its natural resources base. Development strategies should be targeted at natural resources which provide an advantage for the investor and away from those locations where the resources are barriers to effective and sustained operation.

WATER ORIENTATION

- Water and waterlife provide the foundation for numerous tourism attractions found within the study zone. Future tourism development should recognize the significance of these resources as travel generators and should situate itself adjacent to those areas where suitable water surface exists and environmental degradation can be minimized.

FOCUS ON URBAN CENTRES' INFRASTRUCTURE

- Within the study zone, community environments provide less expensive and more efficient support infrastructure (e.g. hydro, water, sewers, fire protection), more favourable financial leverage for investors, increased business volume from local trade and more year-round patronage from business travellers. Development strategies within this zone should be focussed upon those urbanized communities which are removed from the attraction base, yet can provide quick and efficient transportation linkages.

MAN-MADE ATTRACTIONS

- Tourism resources indigenous to an area normally provide the "competitive edge" necessary to attract tourists to a region. However, in particularly challenging market situations, additional and appropriate "foot-loose" attractions (e.g. amusement parks, slide rides, etc.) can be established to strengthen market

position. When required, suitable artificially created and strategically located tourism developments should be established in order to increase a competitive market position.

INTEGRATE
PUBLIC AND
PRIVATE
RESOURCES

- Crown land and Provincial Park resources (e.g. waterways, wildlife, vegetation cover) exhibit tremendous potential as tourism attractions. Development strategies should be designed to integrate these public resources with private sector tourism operations.

TRAVEL
CORRIDORS

- Within the zone, the existing transportation network, especially highway and waterway, is a key locational determinant for tourism. Tourism developments should be situated at locations which can be linked to travel corridors.

EXTENDED
SEASON

- Tourism within the study zone exhibits a strong seasonal focus. This situation leads to high levels of off-season unemployment for managerial and skilled tourism employees, low investment return and under-utilization of plant for the majority of the year. Tourism development should strive to encourage tourism activities during the shoulder and off-peak seasons.

COMMUNITY
SUPPORT

- In those areas where strong local attitudes are held against tourism, the limited community support, availability of finances and labour may severely hamper the potential success of tourism businesses. Efforts should be made to change this negative attitude to a more positive one by explaining the value of tourism to the community.

FOCUS
ON HIGH
CAPABILITY
NODES

- Not all locations within the study zone are equally endowed with the development factors required for successful tourism. In fact, some areas exhibit little or no potential in this regard. Development strategies should be directed at those areas with high potential, provided that a suitable level of resource protection can be provided.

Marketing

**THEMATIC
IMAGE**

- Strong thematic image identification (e.g. history, culture) places many tourism attractions and destinations in a favourable position from a marketing perspective. Development strategies should strive to associate the attractions, facilities, services and events proposed for each tourism area with themes portraying a distinguishable and unique identity.

**EXPAND
TRADITIONAL
MARKETS**

- Tourism within the study zone has traditionally captured a relatively stable market of Ontario and American visitors. Development strategies associated with retaining and expanding both the volume and length of stay of these markets should be encouraged.

**DAY-USE
MARKETS**

- The study zone attracts large seasonal cottage and campground markets. These markets exhibit consumer and recreation behaviour patterns similar to those of local residents. Development strategies should be tailored to the needs of these day-use tourism segments.

**SPECIALTY
MARKETS**

- A limited variety of specialty markets are catered to within the study zone. Yet, in those limited situations (e.g. rockhounds, snowmobilers), the results have been extremely positive. Development strategies should encourage the creation of a broader range of more attractive or marketable tourism experiences which can more closely meet the needs of the specialty markets.

**INTERNATIONAL
MARKETS**

- The study zone's strong natural resource base appeal will continue to attract international markets. Where cost and effort are justified, tourism development should focus on establishing tourism promotional and marketing programmes suited to these markets.

GROUP
TRAVEL

- As travel costs continue to rise, greater shifts will occur toward mass transit tourism. Development strategies should be oriented toward meeting the needs of tour package, railway, bus and other mass transit markets which may frequent the zone.

EXTENDED
SEASON

- Tourism within the study area is highly seasonal. Development strategies should centre on developing events, package tours, festivals and other activities which extend the operating season into traditionally shoulder seasons.

STRATEGY OPTIONS AND APPROACH

Strategy Options

Several thematically based strategies are available for encouraging tourism development with this tourism zone. Each is comprised of a continuum of approaches which range from spatial diffusion to concentration; market-oriented product differentiation to market segmentation; and economic-based sectoral strategies to regional strategies.

Strategy Approach

In the long-run, a strategy which recognizes the need to develop "tourism products" tailored to the needs of a competitive marketplace (i.e. market segmentation) and which capitalizes on the collective resources of the tourism area (i.e. regional integration) will have the highest relative probability of success.

Our assessment of the zone strongly supports incorporating this strategy within an overall framework of tourism concentration. From a tourism business perspective, such an approach will translate into lower development costs as well as increases in the ease of management. It will also assist in creating the amount of business necessary for successful commercial tourism operations.

This tourism development strategy is structured around the following:

- Themed nodes of tourism development concentration;
- Connecting touring corridors for funnelling traffic to and between zones;
- Supporting hinterlands which provide additional services demanded by tourists within the zone.

Development Nodes

Strategically positioned tourism nodes (e.g. Peterborough and Barry's Bay/Mt. Madawaska) provide the focus for opportunity development within the zone. These nodes are geographical areas which possess a particularly attractive combination of natural and man-made resources. Together they give the area a generally high probability of success from both tourism investment and development perspectives. These development nodes are focussed on urban centres which typically include existing tourism facilities as well as a diversity of tourism attractions and other supporting services which have already demonstrated some viability and stability. Not only is it generally easier to profitably operate a tourism business in areas where other tourism attractions and services exist, but the investment capital is normally easier to acquire.

The nodes have been identified according to their resource and market capabilities. In particular, they are either single market day-use, overnight or extended stay development nodes, or they are multi-market centres serving a combination of these market segments. They represent a hierarchy of lower to higher order development centres.

Day-Use Nodes

Day-use nodes are oriented toward the development of tourism facilities and attractions for use by local residents and transient regional markets on a non-overnight basis. Development of accommodation facilities is not

a direct concern within day-use nodes. Day-use nodes should be comprised of normal service centres and commercial enterprises (e.g. auto service stations, grocery stores, specialty food shops, food and beverage operations, etc.) as well as a limited array of recreation-oriented facilities (e.g. picnic and beach areas, day-use parks and information centres). Day-use nodes may be year-round or seasonal; however, where feasible they should be year-round. The mix of attractions, services and facilities developed must be able to satisfy a continuing inflow of transient short-stay visitors. Day-use nodes are strategically positioned along touring corridors within the zone where the necessary resource base exists and the associated supporting services are at least partially in place or can be easily established. Examples of strictly day-use nodes include Rosedale and Hastings.

Overnight Development Nodes

Overnight development nodes are designed to service tourists remaining in the area for a period of up to three nights. Catering primarily to the traditional Metro Toronto and, to a lesser extent, Durham Region, Trenton and Belleville weekend markets, these nodes are more demanding than day-use nodes in terms of the type, diversity and quality of their tourism offerings. They must provide many of the same tourist services as day-use nodes but on a more diversified and integrated basis. They also require a higher quality of tourism attraction and more distinctive identity in order to capture their target markets. Examples of this type of development node include Peterborough and Bancroft.

Extended Stay Development Nodes

Extended stay development nodes are designed primarily to attract visitors on a long-stay basis (i.e. more than three nights). These nodes must be able to provide attractions, services and facilities which can be repeatedly used by patrons with little waning of interest. They must also be able to compete for specialty, package and vacation markets on at least a provincial basis. As a consequence, such nodes must be in close proximity to a high quality tourism attraction base and should be capable

of providing a broad range of top-notch tourism facilities, services and programmes. Examples of extended stay development nodes are Barry's Bay/Mt. Madawaska and the Rice Lake area.

Touring Corridors

While tourism entrepreneurs will be concerned primarily with increasing tourism flows within their particular development nodes, travel between nodes will occur. Scenic, convenient and efficient touring corridors should link the development nodes in a cohesive fashion. These corridors will provide not only a linkage between the nodes but will also generate some small scale development opportunities for the private sector. Accommodation, food and tourist-related services can be developed at strategic locations enroute. The touring corridors identified in this strategy are concerned with not only high volume auto and boat linkages between nodes, but also low volume specialty market requirements. Hiking, cycling, cross-country skiing, canoeing and snowmobiling market segments represent strategic touring corridor opportunities in this strategy.

Supporting Hinterlands

Tourism investment opportunities do not and should not occur strictly within designated travel corridors and development nodes. Some development opportunities, because of their nature, cannot take place in this fashion. For example, site-specific archaeological and historic attractions and scenic, but environmentally sensitive wildlife viewing points, do not conform to any specific pattern. They are site specific but may not lend themselves to nodal concentration. However, these features do represent significant development opportunities for both private and public sector groups. In such cases, these opportunities will be encouraged in hinterland locations. From a strategic planning perspective, hinterlands represent locations adjacent to but not within nodes. They help to support tourism activity at the points of development concentration.

In this strategy, hinterland tourism developments will be designed so that their main base of operation is located, where practical, within a nearby and appropriate development node (e.g. community based guiding, canoeing and outfitting centres).

In this manner, the hinterland opportunities can also capitalize on the concentration of services found at nodes. While tourism investment opportunities in the hinterland itself will occur, they generally will be small-scale and cater to basic needs (e.g. accommodation, foodservice, supplies and informational assistance).

DEVELOPMENT NODES AND CORRIDORS

The physical resource and tourism infrastructure analysis (Volume 1 - Section II, Volume 2 - Section II) suggests rather dramatically that the study area is comprised of landscape units of varying resource capability and degree of existing infrastructure development. While tourism opportunities exist throughout the zone, some areas have greater potential than others. In fact, readily identifiable and discrete sub-regions become apparent as those areas having particularly recognizable identities and marketable images, while others are relatively bland in comparison.

The zone is comprised of two major tourism development regions. They are aligned on a north-south basis and reflect varying degrees of development, investment potential and marketability from a tourism opportunity perspective.

The northern region focusses on development opportunities in the landscape units of Cavendish, Haliburton Lakelands, Algonquin Highlands, Bark Lake, Monteagle and Chandos Lakelands. Its overriding development theme deals with fostering accessible wilderness tourism experiences.

The southern zone centres on tourism opportunities in the landscape units of Lake Simcoe Shoreline, Mariposa, Ennismore, Rice Lake, Dummer Moraine

and East Carden Plain. Its primary development theme evolves around providing water-orientated tourism opportunities in association with the Trent-Severn Waterway.

The northern region should capitalize on the draw of the provincially and nationally significant Algonquin Park, the thousands of hectares of uninhabited crown land, highly forested landscapes and relatively undisturbed lakelands found within its boundaries. These assets provide a resource base particularly suited to capturing markets seeking outdoor and natural recreational experiences. To protect this resource base from uncontrolled resource exploitation, tourism development should be focussed at certain development nodes. In this strategy, the nodes are centred in the communities of Whitney, Barry's Bay/Mt. Madawaska, Bancroft, Haliburton and Dorset. Each of these centres has an existing infrastructure around which tourism opportunities can be built. Each also has the capability of portraying development themes which reinforce particular aspects of the overriding accessible wilderness image of the region.

The southern region's tourism development potential is intimately linked to, and themed around, opportunities provided by the Trent-Severn Waterway. This corridor is a nationally significant recreation and historic waterway resource. Within the southern region, it is the most dominant "attracting force" for tourism. Comprised of an impressive network of lakes, canals and rivers, this water corridor currently provides a focus for a significant portion of tourism development and recreational pursuits within the zone. It also provides the natural base for one of the most important warm water sport fisheries in Ontario. Along its shoreline are found over 16,000 cottages, numerous private campgrounds, several major clusters of marinas, three Provincial Parks and several Federal picnic areas.

While numerous opportunities for encouraging and improving tourism development along this corridor exist, the system is not without its natural limitations. The lakes in the corridor are relatively shallow,

PETERBOROUGH • HALIBURTON

Tourism Development Strategy

Map 11 Area Development Strategies

Source:
Laventhol and Horwath field work.



LAVENTHOL & HORWATH
MANAGEMENT CONSULTANTS

fertile impoundments. As a result, they are naturally eutrophic and suffer from cultural eutrophication as well as other development pressure. "Cultural eutrophication" or the human induced acceleration of the natural aging process in the lakes has generated a severe proliferation of weed and algae growth as well as a general decline in the quality of the sport fishery. Both of these factors limit water-based expansion of tourism along this corridor. Shoreline development pressure, as reflected in dredging and landfill projects of various kinds, as well as near-shore vegetation removal by chemical and mechanical means has severely reduced the supply of biologically habitat significant wetlands and habitat. The marsh areas which still remain are particularly important for the continued existence of waterfowl habitat in the corridor. Consequently, there are natural limitations to the type and amount of near shoreline tourism development rationally acceptable along the corridor.

A further development stress is associated with excessive fishing pressure. There are strong indications that in some of the Kawartha Lakes (e.g. Pigeon and Chemong), the harvesting of desired sport fish species, particularly Pickerel, may now be at or near the maximum sustainable level. Increased residential and tourist development on these lakes will create even more angling pressure on a system already under stress.

As a consequence of these natural limitations to the Waterway's carrying capacity, future forms of tourism development along the corridor must protect the integrity of the resource base and reduce the associated stress upon its use. It is conceivable that a shortened fishing season will be necessary to ensure future angling success for the most desired sport fish species. To achieve this strategy objective, tourism development opportunities have been identified at specific development nodes. These nodes are centred at Hastings, Rice Lake, Peterborough, Burleigh Falls, Bobcaygeon, Lindsay, Fenelon Falls, Rosedale and Gamebridge. As well, an ancillary, and somewhat peripheral, development focus is situated on the South Lake Simcoe Shoreline (Map 11).

These nodes of tourism concentration have been strategically designated according to their most suitable development orientation. Table 4.1 identifies each of the nodes and the strategic type of development orientation associated with them.

Numerous provincial and regional touring corridors knit these nodes into a well defined network of tourism experiences. In particular, two provincially significant routeways, the Trent-Severn Waterway and Trans-Canada Highway 7, tie the southern nodes to one another in a cohesive fashion. These are interlaced with recreational hiking trails (e.g. Ganaraska) and canoe routes (e.g. Indian River) and regionally significant highway corridors (e.g. Highways 48 and 36).

Development nodes in the northern portion of the study zone are linked by regional highways (e.g. Highway 28, 35 and 60). In addition, the network of nodes is further tied together by snowmobile (e.g. Whitney to Haliburton) and cross-country ski trails (e.g. Barry's Bay to Whitney) as well as canoe (e.g. Whitney to Haliburton) routes which cross hundreds of miles of virtually undeveloped lands.

TABLE 4.1
NODES AND PRIMARY DEVELOPMENT OPPORTUNITY ORIENTATION

<u>Region</u>	<u>Node</u>	<u>Primary Development Orientation</u>
North	Haliburton Area	Day-use Overnight Extended Stay
	Dorset Area	Day-use Extended Stay
	Whitney	Day-use Extended Stay
	Barry's Bay/Mt. Madawaska	Extended Stay
	Bancroft Area	Day-use Overnight
South	South Lake Simcoe Shoreline	Day-use Overnight Extended stay
	Rice Lake Area	Day-use Overnight Extended stay
	Peterborough	Day-use Overnight
	Lindsay	Day-use Overnight
	Burleigh Falls Area	Day-use Overnight
	Bobcaygeon Area	Day-use Overnight
	Fenelon Falls Area	Day-use
	Hastings	Day-use
	Rosedale Area	Day-use
	Gamebridge Area	Day-use

DEVELOPMENT THEMES

This strategy defines two major tourism development regions within the study zone and a series of development nodes within each of the regions. To stimulate the building of strong and favourable market images capable of drawing tourists to the zone, distinct umbrella-like development themes have been identified for each of the regions. The northern theme is Accessible Wilderness. The southern theme is the Trent-Severn Waterway. The strategy, then, recommends distinctive images for each of the development nodes. The images suggested reflect both the unique characteristics of each node, and the overriding development theme of the region in which the particular node is situated. Whenever possible, development opportunities should attempt to emphasize these images through architecture, services and programmes. In this fashion, cohesive and co-ordinated market images can be reinforced throughout the two regions and in the marketplace.

Particular themes around which opportunities should be developed in the northern region deal with the fur and timber trades, mining, wildlife and nature interpretation. All of the above themes have a high potential for interpretation within specific development nodes, and some of the themes can be interpreted throughout the region.

The development themes established at nodes within the southern region all relate to the overriding concern for portraying the high quality natural environment, settlement, culture, canal construction and technology, and recreation characteristics found within the Trent-Severn Waterway environment. Development opportunities identified are designed to capitalize on these unique features as well as the attractiveness of the waterway. Whenever possible, non-consumptive forms of water-oriented development have been encouraged. Specific themes associated with each development node are indicated in Table 4.2.

TABLE 4.2
NODAL DEVELOPMENT THEMES

<u>Region</u>	<u>Node</u>	<u>Main Theme</u>	<u>Nodal Theme</u>
Northern	Haliburton Area	Accessible Wilderness	Year-Round Outdoor Recreation, Fur Trade
	Dorset Area	Accessible Wilderness	Landscape Touring, Year-Round Outdoor Recreation
	Whitney	Accessible Wilderness	Nature Interpretation, Outdoor Recreation
	Barry's Bay/ Mt. Madawaska	Accessible Wilderness	Lumbering, Culture
	Bancroft Area	Accessible Wilderness	Mining, Lumbering
Southern	South Lake Simcoe Shoreline	Trent-Severn Waterway	Marine Activity, Outdoor Recreation
	Rice Lake Area	Trent-Severn Waterway	Native People, Archaeology, Fishing
	Peterborough	Trent-Severn Waterway	Water-oriented Urban Tourism
	Lindsay	Trent-Severn Waterway	Commercial Heritage, Railroad
	Burleigh Falls Area	Trent-Severn Waterway	Water-oriented Outdoor Recreation, Fishing
	Bobcaygeon Area	Trent-Severn Waterway	Lumbering, Canal Construction, Fishing
	Fenelon Falls Area	Trent-Severn Waterway	Lumbering, Milling, Steam Navigation
	Hastings	Trent-Severn Waterway	Native Heritage, Manufacturing
	Rosedale Area	Trent-Severn Waterway	Nature Interpretation
	Gamebridge Area	Trent-Severn Waterway	Native People, Recreation Gateway

DEVELOPMENT OPPORTUNITIES

Tourism opportunities identified in this strategy are discussed in conjunction with the development node to which they are most associated. These nodes are described sequentially according to the range of markets (i.e. extended stay, overnight and day-use) which they are designed to service. A number of identified development nodes have a multiple focus. The South Lake Simcoe Shoreline for example, has development potential to meet the demands of the day-use, overnight and extended stay markets. Peterborough's development potential best matches the day-use and overnight market desires.

It is important to recognize that the opportunities listed are suggestions which are believed to have sufficient merit for development consideration. There are undoubtedly many opportunities which do not appear in this discussion but which only await the entrepreneurial touch and devoted commitment of someone with the flair and skill to make them work. Ideally, this document will spur these individuals on to significant tourism investments.

All development possibilities listed are not necessarily commercially viable. Viability is very much dependent upon an unpredictable mix of managerial skill and creativity, investor financial position, market economic conditions, competition and the availability of risk takers. In short, before implementing these opportunities, a thorough analysis reflecting the details of the project and concept, location, scale of operation, financing and technique of production should occur. Viability can then be determined. Viability in this context relates to whether or not the project is workable in relation to the specific requirements of the owner. In other words, a viable project would be one reflecting the success criteria of the owner and not necessarily those of the normal marketplace. It would also be dependent upon the potential of the project's income and cash flow to cover all debt obligations as well as fixed asset maintenance requirements. The identified opportunities, however, do have the physical capability, accessibility and market demands to make them successful.

The development opportunities are described as follows according to criteria important from both a strategy and an investment perspective. These factors are as follows:

- | | |
|----------------------------|---|
| Strategy relationship | - How the opportunity dovetails with the overall goals of the strategy. |
| Geographic market | - What are the probable origins of tourism flow for the project. |
| Specialty market | - Who are the probable users of the development opportunity once established. |
| Season | - What is (are) the probable season(s) of the year in which the development would be primarily operational. |
| Regional competition | - What is the extent of current regional competition for an investor in this development opportunity. A preliminary evaluation of similar existing or potential opportunities was conducted. If the existing or potential developments within 1 hour's drive were felt to have little or no impact on the identified opportunity the regional competition was said to be low. However, if there were other similar developments successfully operating within 1 hour's drive the competition was deemed high. |
| Role of the private sector | - What would be the most effective role for the private sector in establishing this project. |
| Role of government | - What would be the most effective role for the public sector (i.e. municipal, provincial or federal) in establishing this project. |

Development potential

- A preliminary estimate of project viability based solely on market and resource characteristics as well as access requirements was undertaken. A rating of very good, good or fair was given on the extent of resource characteristics, the current status of market development and the extent of regional competition. If an area was felt to have superior resource development potential for a particular activity or facility, and an identifiable market was in existence and the regional competition low, the development opportunity was given a rating of very good.

Further comments

- Remarks related to development priority within the overall strategy and development node, scale of operation, technique of production, related attractions, development theme, marketing, and management.

SOUTH LAKE SIMCOE SHORELINE DEVELOPMENT STRATEGY

DEVELOPMENT ORIENTATION - DAY-USE/OVERNIGHT/EXTENDED STAY

DEVELOPMENT THEME - MARINE ACTIVITY/OUTDOOR RECREATION

This development node stretches along the southern shore of Lake Simcoe and is approximately a one hour drive north of Toronto via Highway 48. The development of Highway 404 will be particularly important in providing access to the area. Development is concentrated in the Sutton and Jackson's Point areas. Away from the shoreline, the landscape is primarily low swampy sand plains interspersed with pockets of good agricultural land. The shoreline itself provides an excellent base for water-oriented recreation activities. The water resource, coupled with the area's close proximity to Toronto, has resulted in the emergence of the South Lake Simcoe shoreline as a heavily developed tourism area. Traditionally a summer resort and cottage area, Lake Simcoe was one of the first resort and day-trip areas to be developed in Southern Ontario. Steamer trips on the lake and picnic outings were popular events in the 1800's.

More recently, the region has attracted an increasing amount of year-round visitation due to participation in such winter sports as ice fishing, snowmobiling and cross-country skiing. This has resulted in the development of four season destination accommodation and the winterization of many vacation homes.

The tourism development strategy for the South Lake Simcoe Shoreline involves the creation of unique new commercial attractions and facilities in keeping with the node's four season resort destination potential. The development intent is to increase day-use, overnight and extended-stay visitation on a year-round basis. The new, expanded and/or upgraded facilities and attractions are, in some cases, integrated with existing complementary developments.

The major market will continue to be Ontario residents, primarily from Metro Toronto and its environs. It is anticipated that the proportion of U.S. visitation will increase due to the expanded tourism infrastructure and larger range of integrated recreational opportunities. Auto travellers and bus tours will continue to dominate the day-use market. The new attractions, events and recreational facilities should encourage longer stays by the day-use and overnight markets, as well as increase the volume of destination travel. This increased visitation should justify the proposed additional accommodation and foodservice facilities. Development themes focus on the waterway location of the node and related marina activity.

Development Opportunities

Because of the overriding importance of the water resource many of the development opportunities are concentrated on the waterfront. In addition, several events and urban-oriented attractions have been recommended to complement the waterfront activities. Together, these developments should present a cohesive tourism package to the target markets. Specific details of the recommended development opportunities are discussed in Table 4.3 and presented conceptually in Exhibit 4.1. The schematic drawings are not meant to identify the exact location of any of the proposed facilities.

Docking and launching facilities in this area are inadequate to satisfy the needs of the existing boating market. New docking and launching facilities should be developed as an integral component of both existing and recommended destination resort accommodation operations. These are needed to satisfy both present demand and the anticipated growth in boating activity. Boat rental concessions for sailcraft should be components of these new marina facilities.

The provision of a waterslide and food and beverage outlets accessible by water could draw both boaters and bus or auto travellers to the area. They will also help to provide a more diversified foodservice sector.

Rising fuel costs have resulted in a trend toward taking destination vacations closer to home. The energy situation also impacts upon the choice of conference sites. Because of its proximity to major Ontario urban markets, the subject area is an ideal location for both new and expanded destination resort accommodation. A new destination resort accommodation should include extensive small meeting conference facilities and recreation amenities.

Particulars of the proposed conference development are as follows:

- 25 hotel rooms in main lodge building
- 30 two-bedroom cottage units, built in semi-detached pairs
- 2 small themed lounges - one seating 30
 - one seating 30
- 100-seat dining room
- Conference facilities - 1 room seating 150 persons and divisible
 into 2 rooms

 - 2 rooms seating 30 to 50 persons each

 - 4 hospitality rooms accommodating 15 to 30
 persons each
- Tennis courts
- Year-round pool, sauna, hot tub, and whirlpool
- Cross-country ski trails
- Vita parcour
- Boat rentals - sailcraft and cruisers for party fishing charters
- Jogging trails
- Exercise room
- Racquetball court

Some of the recreation facilities such as the tennis and racquetball courts should be open to the public on a pay-as-you-play basis. The boat rental area should include a sailing and windsurfing school. A

waterslide, outdoor roller/ice skating rink and golf school are other proposed recreation facilities for the area which should encourage longer day-use stays and increase the range of activities available to cottagers and other extended-stay visitors.

Jackson's Point boasts one of the more unique live theatre houses in the study zone. As it is currently under-utilized, a music festival is proposed to broaden the appeal of the facility. Proposed events such as the "Sutton half marathon", windsurfing competitions, equestrian events and an ice fishing festival could also increase the area's prominence in sports-oriented markets.

The commercial district of Jackson's Point should be upgraded. This could be undertaken with a nautically themed streetscape. The fairgrounds should be used to develop a farmers market, capitalizing on the abundant supply of locally grown produce. The present retail image of the community is poor and these developments are recommended to enhance the shopping appeal of the village.

A tourist information centre on Highway 48 would serve to orient the visitor to the South Lake Simcoe Shoreline area. Due to the accessibility of the Trent-Severn Waterway, information on its attractiveness from a tourism perspective should be promoted.

A walking tour should be developed, originating in Jackson's Point and following the picturesque Hedge Road to Sibbald Point Provincial Park. The Park houses Eildon Hall, an historic home which is currently used as a museum.

TABLE 4.3
DEVELOPMENT OPPORTUNITIES
SOUTH LAKE SIMCOE SHORELINE

OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Destination Resort	<ul style="list-style-type: none"> - improve extended stay potential - improve services to visitors - increase day-use activities - improve overnight potential - increase range of attractions 	<ul style="list-style-type: none"> - local - regional - provincial - national - U.S. 	<ul style="list-style-type: none"> - conference groups - boaters - cottagers - tour groups 	- year round	- medium	<ul style="list-style-type: none"> - funding - planning - development - operation - promotion 	<ul style="list-style-type: none"> - funding - technical assistance - liaison - promotion 	- very good	- development integrated with extensive recreational amenities
Windsurfing School & Championships	<ul style="list-style-type: none"> - improve local profile - increase day-use activities - increase range of attractions 	<ul style="list-style-type: none"> - local - regional - provincial 	<ul style="list-style-type: none"> - sports enthusiasts - tour groups - cottagers 	- summer	- low	<ul style="list-style-type: none"> - planning - development - funding - operation - promotion 	<ul style="list-style-type: none"> - technical assistance - promotion 	- very good	- to be developed in conjunction with destination resort
Shoreline Route to Sibbald Provincial Park	<ul style="list-style-type: none"> - increase day-use activities - increase range of attractions - increase facilities for outdoor recreationists 	<ul style="list-style-type: none"> - local - regional - provincial 	<ul style="list-style-type: none"> - resort guests - campers - tour groups 	- summer	- low	<ul style="list-style-type: none"> - operation - promotion 	<ul style="list-style-type: none"> - funding - planning - development - operation 	- good	- to be between destination resort and Provincial Park
Ice Fishing Festival	<ul style="list-style-type: none"> - enhance extended stay appeal - bolster winter activity market 	<ul style="list-style-type: none"> - local - regional - provincial - U.S. 	<ul style="list-style-type: none"> - resort guests - tour groups - canoe/kayak groups - cottagers 	- winter	- low	<ul style="list-style-type: none"> - funding - planning - promotion - development - operation 	<ul style="list-style-type: none"> - promotion - technical assistance 	- very good	- additional accommodation must be provided prior to successful staging of this event
Upgrade Existing Food and Beverage Outlets	<ul style="list-style-type: none"> - enhance extended stay appeal - provide better support facilities - improve day-use potential - increase services available to visitors 	<ul style="list-style-type: none"> - local - regional - provincial 	<ul style="list-style-type: none"> - resort guests - tour groups - cottagers - boaters 	- year round	- medium	<ul style="list-style-type: none"> - funding - planning - promotion - development - operation 	- promotion	- good	- restaurants could be themed to provide a Maritime atmosphere
Retail Development (Marine Themed Streetscape)	<ul style="list-style-type: none"> - improve day-use potential - increase range of activities - improve local profile 	<ul style="list-style-type: none"> - local - regional - provincial 	<ul style="list-style-type: none"> - local residents - cottagers - tour groups - boaters - resort guests 	- year round	- high	<ul style="list-style-type: none"> - funding - planning - promotion - development - operation 	<ul style="list-style-type: none"> - promotion - technical assistance 	- good	- year round windsurfing, sailing shop, nautical antiques
Outdoor Roller-Skating Rink/Skating Rink	<ul style="list-style-type: none"> - improve day-use potential - increase range of activities - promote four season development - enhance extended stay appeal - improve overnight potential 	<ul style="list-style-type: none"> - local - regional - provincial 	<ul style="list-style-type: none"> - local residents - cottagers - resort guests - tour groups - boaters 	- year round	- low	<ul style="list-style-type: none"> - funding - planning - promotion - development - operation 	- promotion	- good	- seasonal alternatives provide viability

TABLE 4.3
DEVELOPMENT OPPORTUNITIES
SOUTH LAKE SIMCOE SHORELINE
(continued)

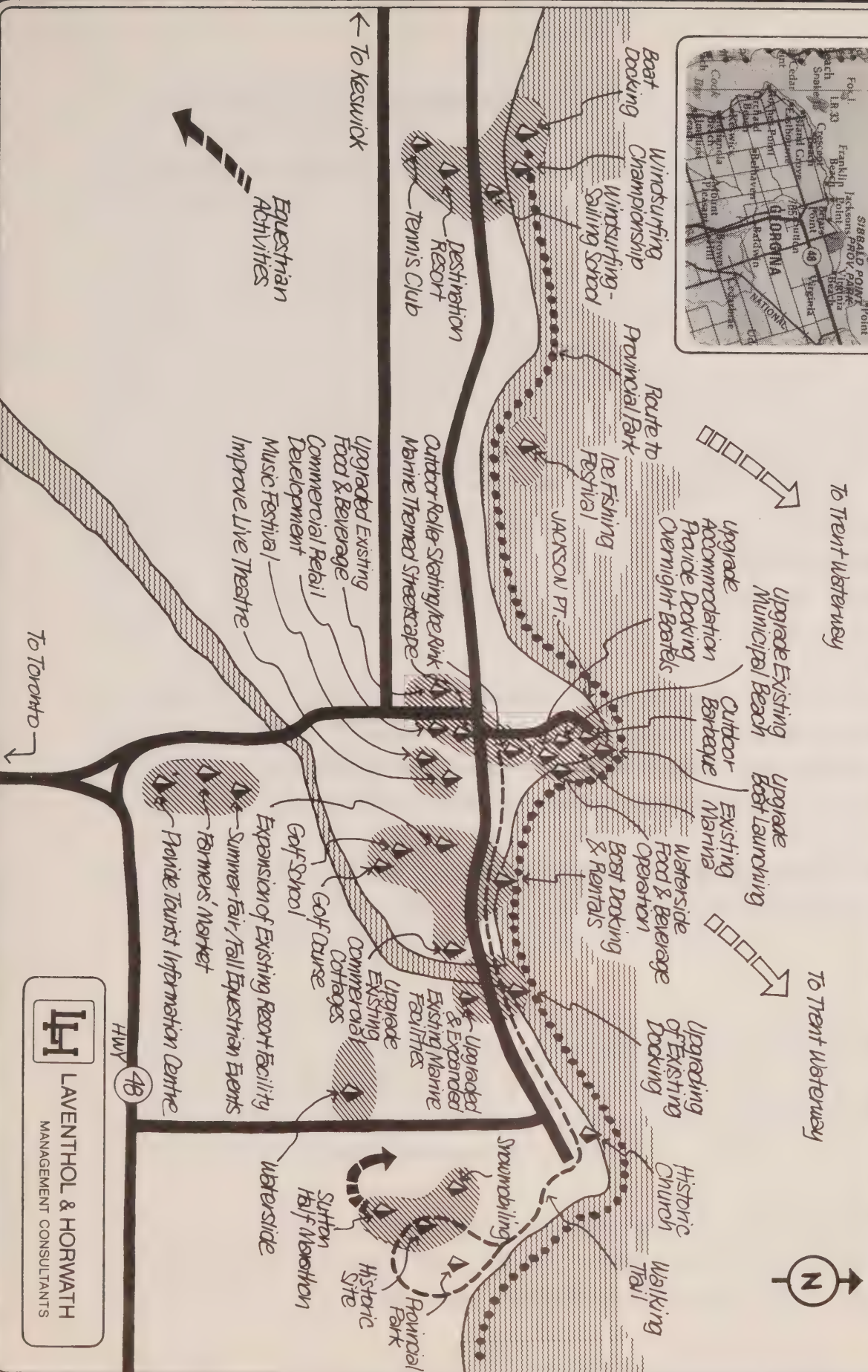
OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Improve Live Theatre Develop Music Festival	- improve extended stay potential - improve services to visitors - increase day-use activities - improve overnight potential - improve local profile	- local - regional - provincial - national	- conference groups - bus tours - cottagers - boaters - resort guests	- summer - fall	- low	- funding - planning - promotion - development - operation	- funding - promotion	- very good	- summer theatre season to be extended to accommodate music festival - outdoor barbeque to be tied into festival
Upgrade Boat Launching & Docking Facilities	- improve boater water access - improve services to visitors - increase day-use activities - improve overnight potential	- local - regional - provincial	- cottagers - boaters - resort guests	- summer	- medium	- funding - planning - development - operation	- funding	- very good	- high priority to provide easier access to water for both boaters and subsequent docking
Development of a Waterside Food & Beverage Operation	- improve services to boaters - improve specialty market attraction - improve/increase day-use activities - promote four season development	- local - regional - provincial	- cottagers - bus tours - boaters - resort guests - conference groups	- year round	- medium	- funding - planning - development - operation - promotion	- promotion - funding	- good	- utilization of existing food and beverage/hotel development subsequent to refurbishing
Upgrade Accommodation (Inclusive of Food & Beverage Operations)	- improve accommodation infrastructure - improve overnight and extended potential - improve services to boaters	- local - regional - provincial	- cottagers - bus tours - boaters - school groups	- year round	- medium	- development - planning - development - operation - promotion	- funding - promotion - technical assistance	- fair	- to provide docking facilities for overnight boaters
Provision of Boat Rentals & Docking	- increase day-use activities - increase services available to visitors - increase facilities for outdoor recreationists - increase range of attractions - improve overnight and extended stay potential	- local - regional - provincial	- cottagers - bus tours - conference groups - resort guests - sports enthusiasts - fishermen	- summer	- medium	- funding - planning - development - operation - promotion	- promotion - funding	- good	- to be integrated with existing resort development - small sailing craft and canoes
Expansion of Existing Resort Development	- improve overnight and extended stay potential - improve accommodation infrastructure - improve services to visitors	- local - regional - provincial - national	- bus tours - conference groups - cottagers - tour groups - boaters	- year round	- medium	- funding - planning - development - operation - promotion	- promotion - funding	- very good	- upgrading of existing affiliated cottages to be included - food and beverage facilities also to be expanded - banquet capacity to be expanded - golf school to be integrated at golf course

TABLE 4.3
DEVELOPMENT OPPORTUNITIES
SOUTH LAKE SIMCOE SHORELINE
(continued)

OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Upgrading & Expansion of Existing Marine Facilities	- increase day-use activity - increase services available - improve specialty market attraction - improve day-use potential	- local - regional	- boaters - cottagers	- summer	- high	- funding - development - operation - planning - promotion	- promotion - funding	- fair	- low priority for development
Sutton Half Marathon	- improve local market profile - improve day-use potential - increase range of attractions - improve specialty market attraction	- local - regional - provincial	- running enthusiasts - sports viewers - cottagers - resort guests	- summer	- low	- funding - development - operation - promotion - planning	- funding - promotion	- very good	- to be integrated with Provincial Park utilizing back roads where possible - to be tied into summer fair
Farmers Market	- improve range of attractions - increase day-use potential - enhance local market profile	- local - regional	- cottagers - bus tours - motorists - campers	- summer	- low	- funding - development - operation - promotion - planning	- promotion	- good	- to be located at fair grounds
Equestrian Events	- increase day-use activity - diversify sports attractions - bolster local profile - improve overnight potential	- local - regional - provincial	- cottagers - tour groups - resort guests - motorists - campers	- fall	- medium	- funding - development - operation - promotion - planning	- promotion	- good	- to be located at fair grounds - directed as a Provincial concern
Waterlides	- increase day-use activity - improve specialty market attraction - increase range of activities	- local - regional	- cottagers - campers - bus tours - motorists - resort guests	- summer - fall	- low	- funding - development - operation - promotion - planning	- funding - promotion	- fair	- location proximate to Park near complementary activity (i.e. Go-Karts)

SOUTH LAKE SIMCOE SHORELINE 4.1

Day use/Overnight/Extended stay



LAVENTHOL & HORWATH
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RICE LAKE AREA DEVELOPMENT STRATEGY

DEVELOPMENT ORIENTATION - DAY-USE/OVERNIGHT/EXTENDED STAY

DEVELOPMENT THEME - NATIVE PEOPLE/ARCHAEOLOGY/FISHING

Located on the southern boundary of Peterborough County, Rice Lake extends for approximately 23 miles in a southwest - northeast direction. This body of water is notable for the number of drumlin islands which it contains. The lake is accessible by both Highways 28 and 45.

Peterborough lies approximately 20 miles to the north and Toronto 65 miles to the west. The area has long been popular for fishing and is known for the large number of environmentally sensitive areas and archaeological sites found along the lake's shoreline. Accessibility, proximity to markets and a rich natural and historic resource base are all factors which make the Rice Lake area a desirable tourism development node.

The development objective for Rice Lake is to increase day-use, overnight and extended-stay visitation on a year-round basis. Many of the recommended developments are designed to capitalize on the natural resource base of the area without destroying its integrity.

The Ontario market (particularly from the Toronto area), the U.S. market and, to a lesser degree, the European market should constitute the focus for tourism development.

Fishing should continue to be a primary travel generator, but the development intent is to broaden the range of attractions and facilities available in the Rice Lake area in order to capture a share of other specialty markets. The major identified development opportunity for this node is a new four season destination resort.

The dominant theme is the accessible waterway system. Other unique sub-themes upon which opportunities can be based include the ecological systems found in the area and the importance of the Rice Lake region in

the heritage of Ontario's native people. The Rice Lake area was originally inhabited by nomadic Indians having a hunting and fishing culture.

As these inhabitants developed agricultural skills, Rice Lake became an attractive area in which to settle because of the wild rice beds and the suitable climate.

As trading relationships developed with other native groups and later with the Europeans, the lake became a strategic link connecting the Kawarthas with Lake Ontario. The continuous occupation of the area by native groups since earliest times has resulted in a remarkable number of archaeological finds in the area. Serpent Mounds is an ancient burial ground which has been developed as a provincial park.

Development Opportunities

Within the Rice Lake development node, we have recommended three areas for development. The first is the Hope Mill-Lang Mill-Century Village heritage attraction area which provides day-trip opportunities from Rice Lake destination resorts, Peterborough and Toronto. This attraction area should operate on a year-round basis. Special event days similar to those now held in the summer season should be created for the winter periods. Sleigh rides, for example, could be held on a regular basis. The foodservice outlet should be upgraded and operated on a year-round basis.

The second area of concentration focuses on water-based activities. Development opportunities include day and overnight canoe trips on the Indian and Otonabee Rivers. Day trips with lightly loaded canoes are recommended for the shallow Indian River. Day trips are possible from access points at the Warsaw Caves, Hope Sawmill and Lake Gristmill. Other navigable sections of the river lie between Warsaw and the Cruikshank Dam and through the marshes between Keene and Serpent Mounds Provincial Park. Serpent Mounds Provincial Park could serve as the

origin and/or termination point for the southern route. A concession could provide canoe rentals and outfitting services. A boat tour originating in Peterborough should take tourists down the Otonabee River on an overnight excursion to a Rice Lake destination resort. The tour could stop at the proposed Indian Crafts Centre, Serpent Mounds Provincial Park and Hastings. An annual fishing tournament should be developed to capitalize on the popularity of fishing on Rice Lake.

Like the tournament held at Bobcaygeon, this event should encourage the live release of fish.

The third development area focuses on a new destination resort. Existing accommodation supply in this area does not meet the needs of the conference market, bus tour groups or upscale traveller. Nearby urban markets and the range of attractions found in the area indicate that Rice Lake has excellent potential to attract these specialty markets. However, emphasis must be placed on the development of high quality recreation amenities integrated with a full-service resort complex.

The recommended resort development particulars are as follows:

- Approximately 30 units in an upscale motor hotel complex
- Approximately 20 high quality cottage units, built in semi-detached pairs
- 70-seat lounge with 30-person stand-up bar
- 100-seat dining room
- Room-service
- Conference facilities - 1 room seating 200 persons, divisible into
 - 3 rooms
 - 2 rooms seating 40 to 60 persons each
 - 4 hospitality rooms accommodating 20 to 40 persons each
- Tennis courts
- Year-round atrium-style recreation centre (including pool, sauna, hot tubs)

- Lawn bowling
- Putting green
- Recreation centre - billiards, ping pong, electronic games, pin-ball
- Library - reading room
- Boat rentals - sailboards, small sailcraft, fishing boats
- Executive golf course

A shuttle bus system to Kawartha Downs, Century Village, downhill skiing at Bethany and Serpent Mounds Provincial Park should be offered to tourists. Viewing of wildlife areas and other ecologically interesting phenomena could be incorporated into the tour boat excursions on Rice Lake. (For further details see Tour VI, pages 149 and 252 in this Volume.)

The destination resort complex will likely encourage further upgrading of both resort and commercial cottage operations located on Rice Lake. Furthermore, the availability of both accommodation and food and beverage facilities to boaters should help to generate both longer stays and greater usage of the complementary recreation activities and facilities.

The foregoing development opportunities are detailed in Table 4.4 and conceptually presented in Exhibit 4.2. The development opportunities are designed to complement the existing infrastructure and resource base and to avoid damage to environmentally sensitive areas.

TABLE 4.4
DEVELOPMENT OPPORTUNITIES
RICE LAKE AREA

<u>OPPORTUNITY</u>	<u>STRATEGY RELATIONSHIP</u>	<u>GEOGRAPHIC MARKET</u>	<u>SPECIALTY MARKET</u>	<u>SEASON</u>	<u>REGIONAL COMPETITION</u>	<u>ROLE OF PRIVATE SECTOR</u>	<u>ROLE OF GOVERNMENT</u>	<u>DEVELOPMENT POTENTIAL</u>	<u>FURTHER COMMENTS</u>
Destination Resort	- improve overnight and extended stay potential - improve services to visitors - increase day-use activities - increase range of attractions	- local - regional - provincial - national - U.S. - international	- conference groups - fishermen - tour groups - cottagers - upscale market - boat tours	- year round	- medium	- funding - operation - planning - development - promotion	- funding - promotion	- good	- destination for tour boat - day trips to Kewartha Downs, Bethany, Peterborough, Century Village - all upscale recreation amenities to be included
Canoe Routes	- improve use of natural resources - improve extended stay potential - increase day-use potential - increase range of attractions	- local - regional - provincial	- canoeists - campers	- spring - summer - fall	- medium		- promotion - funding - operation - planning - development	- good	- canoe rental concession to be based at Serpent Mounds Provincial Park
Indian Craft Centre	- opportunity to present Indian heritage - increase range of attractions - improve extended stay and overnight potential	- local - regional - provincial	- boaters/canoeists - cottagers - campers - motorists - bus tours - boat tours	- spring - summer - fall	- high	- operation	- funding - promotion - development - planning	- fair	- local Indian tribe to serve as supplier and operators
Upgrading of Existing Housekeeping Operations	- improve accommodation infrastructure - improve overnight and extended stay potential - improve services to visitors	- regional - provincial	- boaters - motorists - fishermen	- spring - summer - fall	- high	- funding - operation - planning - promotion - development	- funding - promotion - technical assistance	- good	- upgrading should occur as new resort serves as a catalyst - provision of more recreation amenities
Rice Lake Bass Tournament	- improve area profile - improve overnight potential - improve day-use potential - increase range of attractions	- local - regional - provincial - national	- fishermen - campers	- summer	- high	- funding - operation - planning - promotion - development	- promotion	- very good	- high priority in order to align and improve already large market share

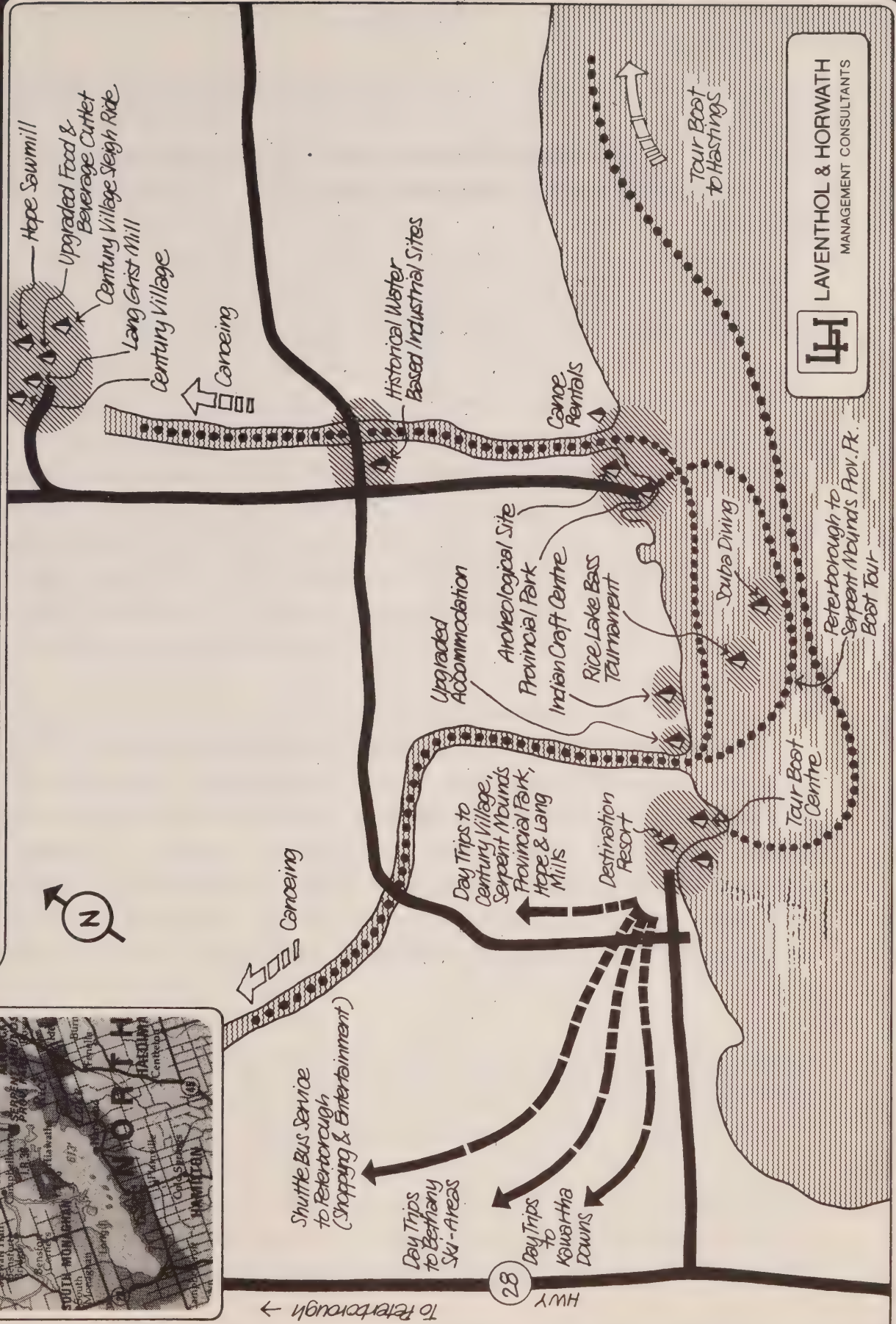
TABLE 4.4
DEVELOPMENT OPPORTUNITIES
RICE LAKE AREA
 (continued)


<u>OPPORTUNITY</u>	<u>STRATEGY RELATIONSHIP</u>	<u>GEOGRAPHIC MARKET</u>	<u>SPECIALTY MARKET</u>	<u>SEASON</u>	<u>REGIONAL COMPETITION</u>	<u>ROLE OF PRIVATE SECTOR</u>	<u>ROLE OF GOVERNMENT</u>	<u>DEVELOPMENT POTENTIAL</u>	<u>FURTHER COMMENTS</u>
Upgrading of Food and Beverage Operations-Century Village	- improve services to visitors - increase day-use potential - improve self supportiveness of area - improve overnight potential	- local - regional - provincial - national	- campers - resort guests - canoeists - tour groups	- year round	- low	- operation	- funding - planning - development - promotion	- good	- operation could be a concession - year round status of development must occur first
Century Village Sleigh Ride	- improve year round market - increase day-use potential - improve overnight potential	- local - regional	- resort guests - tour groups	- winter	- low	- operation	- funding - planning - promotion - development	- good	- operation could be a concession through a local group of farmer(s)

RICE LAKE AREA

Day use/Overnight/Extended stay

4.2





LAVENTHOL & HORWATH
MANAGEMENT CONSULTANTS

HALIBURTON AREA DEVELOPMENT STRATEGY

DEVELOPMENT ORIENTATION - DAY-USE/OVERNIGHT/EXTENDED STAY

DEVELOPMENT THEME - FUR TRADE/YEAR-ROUND OUTDOOR RECREATION

The Village of Haliburton is situated in the heart of the Haliburton Highlands. The undulating forested terrain and abundance of lakes and rivers have made sightseeing in the Highlands popular, especially during the fall colour season. Traditionally a summer resort and cottage area, the Haliburton region has more recently become known for winter sports as well. An extensive network of trails and touring routes exists for snowmobiling, cross-country skiing, canoeing and dirt biking. Downhill skiing is available at Sir Sam's Ski Area. Fishing, boating and other water-oriented activities have a strong appeal in the summer months. Although commercial accommodation and vacation home properties are found on lakes throughout the region, Kashagawigamog Lake is the focus of major resort and cottage development in the area,

Haliburton Village acts as a local service centre for the area's visitors. Attractions such as a museum, an art gallery, an historic steam locomotive, the Haliburton School of Arts and Crafts, a lookout park and a municipal waterfront park all draw people into the community. In addition, a variety of retail shops and a tourist information centre are found in Haliburton. Annual events which attract visitors include an air show, a fiddle and step dance contest, a dirt bike rally and a variety of hockey tournaments, snowmobile races and cross-country skiing events.

The development strategy for Haliburton is aimed at increasing day-use, weekend and extended stay visitation on a year-round basis. The primary target market for this development node is the Ontario resident, particularly from the Metropolitan Toronto - Golden Horseshoe area. American visitors will continue to play a minor role as a viable market, as will those from the rest of Canada and the overseas markets. Bus tours visit the Haliburton area primarily in the fall to view the autumn

foliage. One area resort caters now exclusively to senior citizen tours during the summer. The bus tour market should be extended to include other special interest groups such as cross-country skiers.

The intent of proposing these development opportunities is to increase the number of attractions available to visitors to the Haliburton area. It is important that the vacationer see the Haliburton region as a unique destination with a complete and integrated set of recreational opportunities.

"Accessible wilderness" is the dominant theme for the area. Haliburton Village will continue to be the focus of day-use activities and services. The surrounding area will offer opportunities for extensive outdoor recreation and overnight accommodation. Historical and cultural sub-themes based on the lumbering industry and the fur trade should also be represented.

Development Opportunities

As indicated in Exhibit 4.3, the Village of Haliburton consists of three distinct tourism activity areas. The first activity area focuses on Head Lake. Emphasis on the Head Lake area is on the development of water-oriented recreation/tourism opportunities. Phase I of the waterfront park development is essentially complete and includes a beach, boat dock and picnic area. Phase 2 will add a lookout, an amphitheatre and a children's play area. The second activity area is located within the business and recreation districts. This area of the community provides urban amenities such as cultural attractions, shopping and foodservice outlets in addition to specialized recreation facilities and events. A Slide Ride has recently been constructed in this area. The possibility of adapting this site to permit a toboggan run in winter, similar to the one in Quebec City, should be investigated. These two areas of concentration should be linked by a walking tour which will highlight the community's heritage resources. The general store, rail line and old churches will form an integral part of the tour.

The third area of tourism activity concentration is along the shore of Lake Kashagawigamog. Development proposals for the Lake Kashagawigamog area include expanding the trail networks, adding services for trail users and augmenting the quality and quantity of resort accommodation. Some upgrading and expansion of area resorts has taken place in an effort to attract the conference market.

A new four seasons destination resort is recommended for the Haliburton area. It should be a first-class facility with extensive conference facilities and recreational amenities. It should have access to the area's snowmobiling and cross-country skiing trails. Development particulars are as follows:

- 60 to 75 guest rooms
- 125-seat restaurant with terrace, and a small snack bar
- 75-seat lounge
- 1 meeting room seating 100 persons and divisible into 2 rooms
- 3 conference rooms seating 25 to 35 persons each
- Indoor pool, sauna, whirlpool
- Tennis courts
- Exercise area
- Boat docking and rentals

The Lake Kashagawigamog area and the Village of Haliburton should be linked via a shuttle bus service, especially during the summer months. This will relieve traffic congestion in the community and serve to integrate the two areas of development concentration.

A self-guided automobile tour of the surrounding scenic and historic attractions should be designed, with appropriate signage and guide maps. The Minden White Water Park, the historic Bethel Church, Ritchies Falls, the water-powered sawmill at Kinmount and the Harburn Natural Wells should be included on the route. The incomplete portions of the Peterson Colonization Road which crosses Haliburton Country from Carnarvon to Maynooth have been developed for snowmobiling. Portions of this route

could also be promoted as a hiking trail and as a hut-to-hut cross-country skiing route.

Table 4.5 outlines the development opportunities which should be realized in order to offer the visitor a diversity of tourism experiences and related services. These opportunities are consistent with the aim of preserving the area's resources and with the objectives and capabilities of the local residents.

TABLE 4.5
DEVELOPMENT OPPORTUNITIES
HALIBURTON AREA

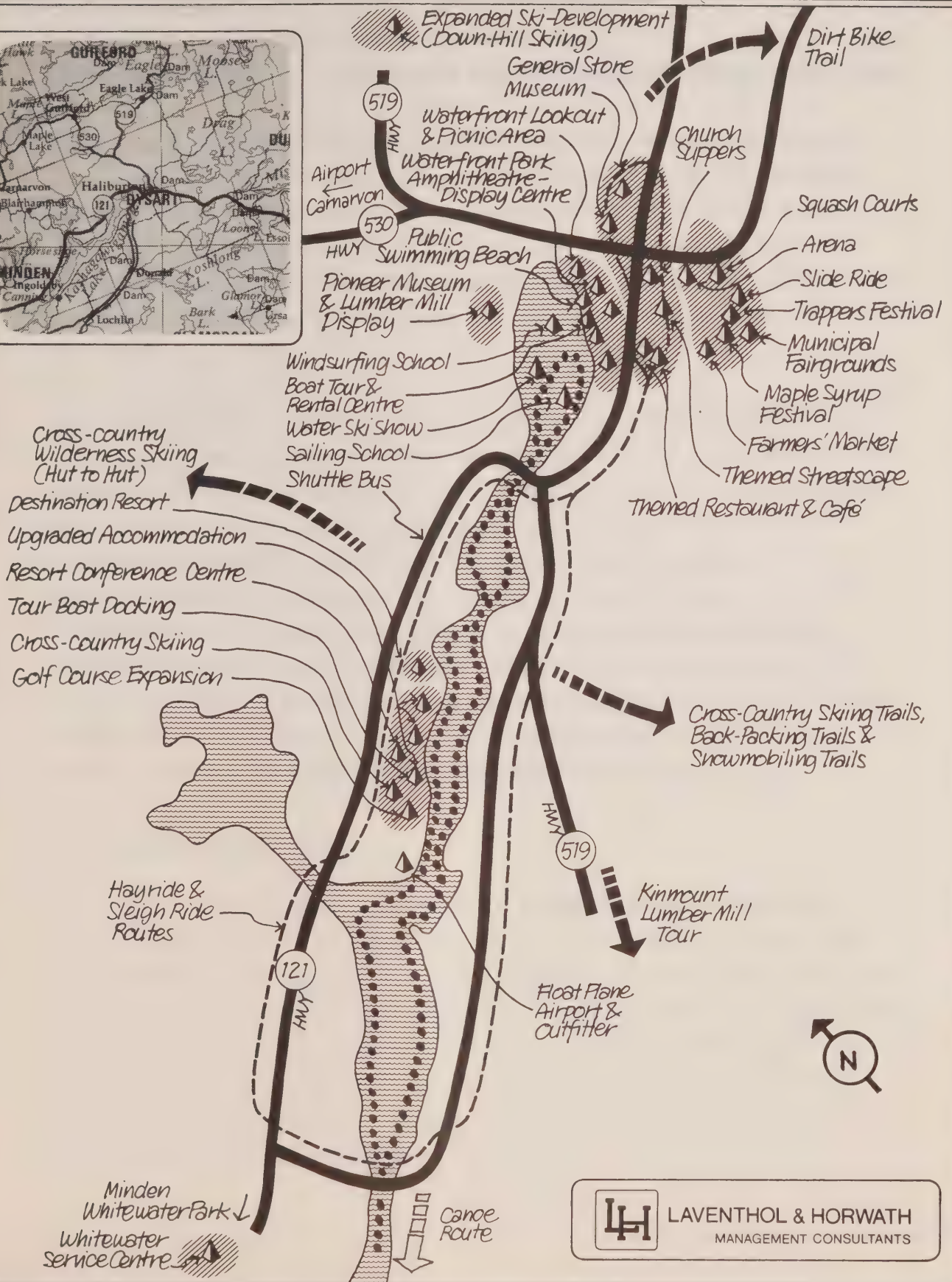
OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Windsurfing and Sailing Centre - Head Lake	- diversify range of experiences - appropriate use of natural resource - encourage extended stay	- provincial - national - U.S.	- Windsurfers - sailors	- summer	- low	- funding - development - operation - promotion	- promotion	- very good	- should offer instruction and equipment rental
Boat Rental Centre - Head Lake	- additional service to tourists	- provincial - national - U.S.	- boaters	- summer	- medium	- funding - development - operation - promotion	- promotion	- good	
Expanded boat cruise- Haliburton and Lake Kashagawigamog	- meet needs of tour groups and expanded tourist market	- provincial - national - U.S.	- tour groups - resort guests - cottagers	- summer - fall	- low	- funding - development - operation - promotion	- promotion	- very good	- present cruise boat not large enough to handle a full bus load
Display and Interpretive Centre - Head Lake Park	- increase range of attractions	- local - regional - provincial - national - U.S.	- tour groups - school groups	- year round	- low	- promotion - funding - development - operation - promotion	- planning - funding - development - operation - promotion	- good	- permanent display of interpretive material and space for arts and crafts exhibits
Water Ski Shows - Head Lake	- increase range of attractions	- local - regional - provincial - national - U.S.		- summer	- low	- funding - operation - promotion	- promotion	- very good	- could be weekly event
Restaurant and Cafe	- meet the needs of expanded tourist market	- local - regional - provincial - national - U.S.	- tour groups - cottagers	- year round	- low	- funding - development - operation - promotion	- promotion - funding	- very good	- high quality, licensed facility with sidewalk cafe component in summer - ideal location would overlook water
Upgraded Streetscape	- create a more appealing tourism centre - represent heritage themes	- local - regional - provincial - national - U.S.		- year round	- low	- funding - development	- planning - technical assistance - funding	- good	- upgrade storefronts and signage in themed manner

TABLE 4.5
DEVELOPMENT OPPORTUNITIES
HALIBURTON AREA
(continued)

OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Farmers Market	- increase range of attractions	- local - regional - provincial - national - U.S.	- cottagers	- summer - fall	- low	- funding - development - operation - promotion	- promotion	- very good	- could use fair grounds
Maple Syrup Festival	- increase range of attractions	- local - regional - provincial	- school groups	- spring	- low	- funding - development - operation - promotion	- promotion - planning	- good	- include trips to Sugarbush, pancake breakfasts, country-style entertainment
Trapper's Festival	- represent heritage theme - increase range of tourist attractions	- local - regional - provincial		- fall	- low	- funding - development - operation - promotion	- promotion - planning	- good	- recreates semi-annual fur sales held in Haliburton until 1895
Outfitter	- meet needs of trail and canoe route users	- provincial - national - U.S.	- canoeists - skiers - hikers	- year round	- low	- funding - development - operation - promotion	- promotion	- good	- outfitting, guiding and fly-in service for canoeists, hikers, cross-country skiers
Destination Resort Complex	- encourage extended stay visitation - meet needs of increasingly sophisticated market	- provincial - national - U.S.	- upscale market - tour groups	- year round	- medium	- funding - planning - development - promotion - operation	- promotion	- very good	- high quality, full-service facility
Peterson Road Recreation Trail	- consistent with accessible wilderness theme - increase range of recreational opportunities - encourage extended stay visitation - opportunity to interpret heritage theme	- local - regional - provincial - national - U.S.	- hikers - skiers - tour groups - school groups	- year round	- medium	- funding - development - operation - promotion	- planning - technical assistance - promotion - funding	- very good	- develop hiking, hut-to-hut cross-country skiing, wilderness camping - develop shorter loops for flexibility

TABLE 4.5
DEVELOPMENT OPPORTUNITIES
HALIBURTON AREA
(continued)

OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Walking Tour of Haliburton Village	- opportunity to interpret heritage themes - expose visitors to resources and attractions of community	- local - regional - provincial - national - U.S.	- historical enthusiasts - tour groups - school groups	- year round	- low	- promotion	- planning - funding - development - promotion	- good	- highlight early days as lumbering frontier town - include general store, historic churches and modern day attractions such as Head Lake Park, Slide Ride
Scenic Automobile Tour	- link Haliburton with surrounding attractions	- regional - provincial - national - U.S.	- cottagers - resort guests	- year round	- low	- promotion	- funding - planning - development - promotion	- good	- develop self-guiding map and signage
Whitewater Service Centre	- increase range of attractions thus encouraging extended stay	- provincial - national - U.S. - international	- canoeists - kayakers	- spring - summer - fall	- low	- funding - development - operation - promotion	- promotion	- very good	- at Minden Whitewater Park - offer instruction and canoe and kayak rentals
Lumber Mill Tour and Lumbering Display	- opportunity to interpret heritage theme - increase range of attractions	- regional - provincial - national - U.S.	- historical enthusiasts - tour groups - school groups	- year round	- low	- funding - development - operation - promotion	- promotion	- good	- could use lumber mill near Haliburton Village on Highway #519 - requires co-operation of mill
Hay Ride, Sleigh Ride	- expand range of attractions	- local - regional - provincial	- resort guests - cottagers	- year round	- low	- funding - development - operation - promotion	- promotion	- good	
Shuttle Bus Service	- provide better access to area's attractions - integrate development areas	- regional - provincial - national - U.S. - international	- cottagers - resort guests	- year round	- low	- funding - development - operation - promotion	- planning - promotion	- good	



DORSET AREA DEVELOPMENT STRATEGY

DEVELOPMENT ORIENTATION - DAY-USE/EXTENDED STAY

DEVELOPMENT THEME - LANDSCAPE TOURING/YEAR-ROUND OUTDOOR RECREATION

Dorset is a picturesque village located at the eastern end of Lake of Bays. The popular Muskoka resort and cottage country lie to the west, the Haliburton Highlands to the east and Algonquin Park to the north. These attractions, as well as its location on the Highway 35 travel corridor, make Dorset an ideal tourism development node. At present, the community attracts day-use visitors because of its unique general store and observation tower.

The development strategy for Dorset involves increasing both day-use and extended stay visitation on a year-round basis. It is expected that Ontario residents, particularly from Toronto and vicinity, and Americans will continue to constitute the primary target markets for further tourism developments. Limited visitation may also be derived from other Canadian provinces or Europe. The intent of this strategy is to attract these markets by adding to the supply of attractions and destination accommodation facilities. As is the case with other communities in the northern portion of the study zone, accessible wilderness is the dominant theme and new development opportunities are designed to capitalize on the natural resource base without destroying its integrity.

Development Opportunities

Area canoe routes link-up with those in Algonquin Park. Further use could be made of the region's water resources by developing a boat tour on Lake of Bays. Dorset should be the terminus for this trip. The tour would serve not only the area's destination resort guests but could also be marketed to day bus tour groups. The tour should offer stops at other communities on the lake such as Baysville and Bigwin. The lake should also be utilized for sailing and windsurfing, with equipment and instruction available in Dorset.

There are numerous snowmobile trails in the area which connect with the Haliburton County and Muskoka District trail networks. Cross-country skiing is available at the Leslie M. Frost Natural Resources Centre just south of Dorset. Trails originating in Dorset could be developed to connect with those at the Frost Centre. A scenic auto tour should be designed and promoted. It should tie Dorset and the area's attractions together. The observation tower, the Frost Centre, the Kanawa International Museum of Canoes and Kayaks, Hawk River Rapids and Buttermilk Falls should all be included in the tour route.

A new destination resort should be developed in Dorset, with high quality amenities and a full range of services. Such a facility will not only enable the community to accommodate bus tours, the small business meeting conference market and the more discriminating traveller but will also serve as an attraction in itself. A sauna, whirlpool, guide and instruction services should be offered as well as a shuttle bus service to downhill skiing at Huntsville.

Details of the proposed development's components are listed below:

- 60 guest rooms
- 15 two-bedroom cottage units with fireplaces
- 125-150 seat dining room and snack bar
- 75 seat lounge
- 1 meeting room seating 125 persons and divisible into 3
- 2 conference rooms seating 20 to 30 persons each
- Indoor pool, sauna and whirlpool
- Tennis courts
- Boat docking and rental areas

Tourist services such as an interpretive centre and a tourist information centre should be present in Dorset. Together, they would enhance a tourist's appreciation and awareness of the area and draw day-use as well as greater extended stay visitation.

The foregoing development opportunities are detailed on Table 4.6, and presented in conceptual form on Exhibit 4.4.

TABLE 4.6
DEVELOPMENT OPPORTUNITIES
DORSET AREA

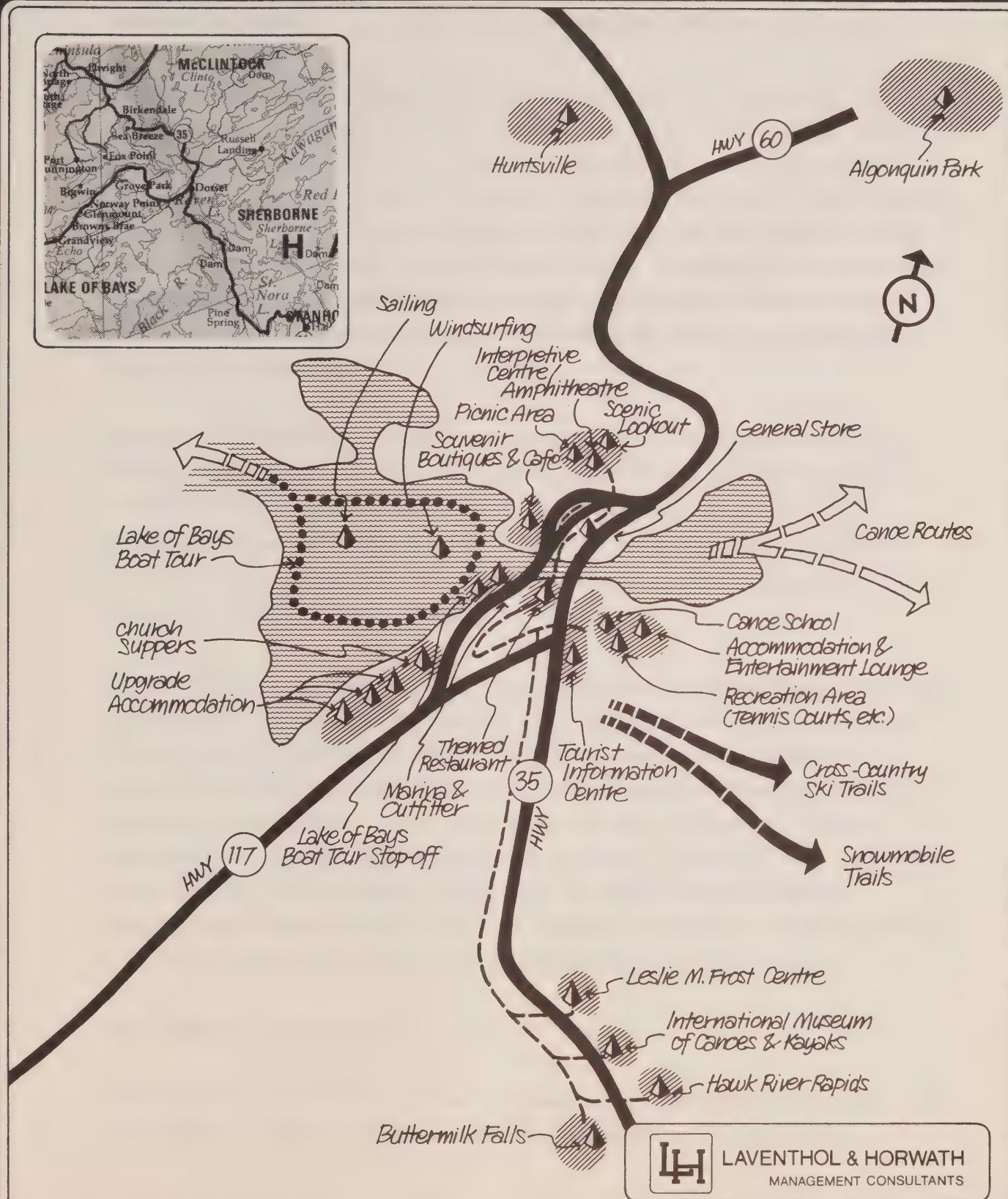
OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Lake of Bays Boat Tour	- increase range of attractions - improve day-use potential	- local - regional - provincial - U.S.	- tour groups - resort guests - cottagers	- summer - fall	- medium	- planning - funding - development - operation - promotion	- promotion - funding	- very good	- include party cruises, moonlight cruises
Sailing and Windsurfing Centre	- increase range of attractions - improve day-use and extended stay potential	- local - regional - provincial - U.S.	- sailors - windsurfers - cottagers	- summer	- medium	- planning - funding - development - operation - promotion	- promotion	- very good	- offer instructions and equipment rental
Cross-Country Ski Trails	- increase range of attractions - improve day-use and extended stay potential	- regional - provincial	- cross-country skiers - tour groups	- winter	- medium	- funding - development - operation - promotion	- planning - promotion	- very good	- link with trail network at Leslie Frost Centre
Recreation Area	- increase range of attractions - improve day-use and extended stay potential	- local - provincial	- tennis players - children	- spring - summer - fall	- low	- promotion	- funding - planning - development - promotion - operation	- good	- include tennis courts, children's play area
Canoe School	- increase range of attractions - improve day-use and extended stay potential	- regional - provincial - national	- canoeists - school groups	- spring - summer - fall	- low	- planning - funding - development - operation - promotion	- promotion	- very good	- Outward Bound type of facility - could offer winter camping, orienteering as well
Interpretive Centre	- improve services to visitors - improve day-use potential	- provincial - U.S.	- tour groups - school groups - cottagers	- year round	- medium	- promotion	- funding - planning - promotion - operation	- good	- present natural history and ecology themes
Cafe	- improve day-use potential - improve services to visitors	- local - regional - provincial - U.S.	- tour groups	- year round	- medium	- planning - funding - development - operation	- promotion	- very good	- should overlook water

TABLE 4.6
DEVELOPMENT OPPORTUNITIES
DORSET AREA
(continued)

<u>OPPORTUNITY</u>	<u>STRATEGY RELATIONSHIP</u>	<u>GEOGRAPHIC MARKET</u>	<u>SPECIALTY MARKET</u>	<u>SEASON</u>	<u>REGIONAL COMPETITION</u>	<u>ROLE OF PRIVATE SECTOR</u>	<u>ROLE OF GOVERNMENT</u>	<u>DEVELOPMENT POTENTIAL</u>	<u>FURTHER COMMENTS</u>
Church Suppers	- increase range of attractions - improve day-use potential	- local - regional - provincial - U.S.	- cottagers - resort guests	- year round	- low	- planning - development - operation - promotion	- promotion	- good	
Upgrade Accommodation	- improve extended stay potential	- provincial - national - U.S.	- outdoor recreation enthusiasts	- year round	- medium	- planning - development - funding - operation - promotion	- promotion	- very good	- will help attract bus tour market
Destination Resort	- improve extended stay potential - improve services to visitors	- provincial - national - U.S.	- outdoor recreation enthusiasts - upscale market	- year round	- medium	- planning - development - funding - operation - promotion	- promotion	- very good	- full-service, good quality facility - include saunas, whirlpools, guiding & instruction services
Scenic Auto Tour	- improve day-use and extended stay potential	- local - regional - provincial - U.S.	- transient auto traffic - transient and overnight campers	- year round	- low	- promotion	- planning - development - promotion	- very good	- include observation tower, Lake Front Centre, Kanawa International Museum of Canoes and Kayaks, Hawk River Rapids, Buttermilk Falls

DORSET AREA Day use/Extended stay

4.4



LAVENTHOL & HORWATH
MANAGEMENT CONSULTANTS

WHITNEY DEVELOPMENT STRATEGY

DEVELOPMENT ORIENTATION - DAY-USE/EXTENDED STAY

DEVELOPMENT THEME - NATURE INTERPRETATION, OUTDOOR RECREATION

Whitney, located on Highway 60 at the eastern gate to Algonquin Park, acts as a service centre for visitors to the park. Visitors to Whitney benefit from being able to utilize the considerable resources of the park. Algonquin Park, with its camping, nature, hiking and cross-country trails, canoe routes, scenic beauty and interpretive programmes, is the primary travel generator for the Whitney area. Complementary commercial developments are located outside the park boundaries in Whitney and include motels, resorts, outfitters, service stations and a variety of retail establishments.

Because of its relative distance from major urban markets vis-a-vis communities at the park's western gate, Whitney has not experienced the intensity of development evident in the Huntsville area. For this reason, Whitney has a unique appeal for the wilderness-oriented park visitor. The visitor can obtain necessary services without having to confront a highly urban environment.

The development strategy for Whitney should aim at attracting day-use and extended stay visitation during all four seasons. Capitalizing on the drawing power of Algonquin Park, Whitney's target markets should be Ontario residents, particularly from Metro Toronto and Eastern Ontario, and European visitors. Auto travellers and bus tour groups who are interested in outdoor activities such as hiking, canoeing and cross-country skiing should constitute the prime market segments. Tourism development should centre on expanding existing tourist services and, where applicable, creating new facilities and attractions.

Development Opportunities

Because the area's natural resource base is the key attraction, any development which takes place must be consistent with the aim of

preserving the natural environment. The intention is to provide park visitors with amenities and services not available within the park, but complementary to the park's attractions. The theme around which development should occur stresses Whitney's role as the eastern gateway to Algonquin Park's accessible wilderness. Thus, development opportunities for Whitney include an information and interpretive centre and outfitting and guide services. Existing destination accommodation should be expanded in order to meet the size requirements of the tour group market. In addition to new guest rooms, these resorts should provide recreation amenities such as saunas, whirlpools and hot tubs and complete dining and entertainment facilities.

The above facilities and services should be presented to the potential visitor as a vacation package, such that his accommodation, outfitting and trail guides are all included. Excursions to the Mt. Madawaska downhill skiing centre could also be offered.

Natural history and the forest industry are the two sub-themes which could best be represented in Whitney. Both are consistent with the accessible wilderness theme.

The interpretive centre, which should introduce visitors to Algonquin Park's attractions, focuses on natural history. The forest industry can be represented as the major theme of an arts and crafts shop. This could be housed in the old Turtle Lodge building which once stood in Algonquin Park and served as a retreat for the legendary Ottawa lumber baron, J. R. Booth and his associates. The lodge, which would have to be relocated in Whitney, could also house a mini lumbering museum complementing the museum in Algonquin Park.

Details of the proposed development opportunities are listed in Table 4.7 and presented in conceptual form on Exhibit 4.5.

The recreation trails and canoe routes constitute the key linkages in the Whitney area. It is important that these continue to be well maintained, and, where appropriate, extended. Hut-to-hut skiing along the cross-country routes will greatly enhance their attractiveness to expanding ski markets.

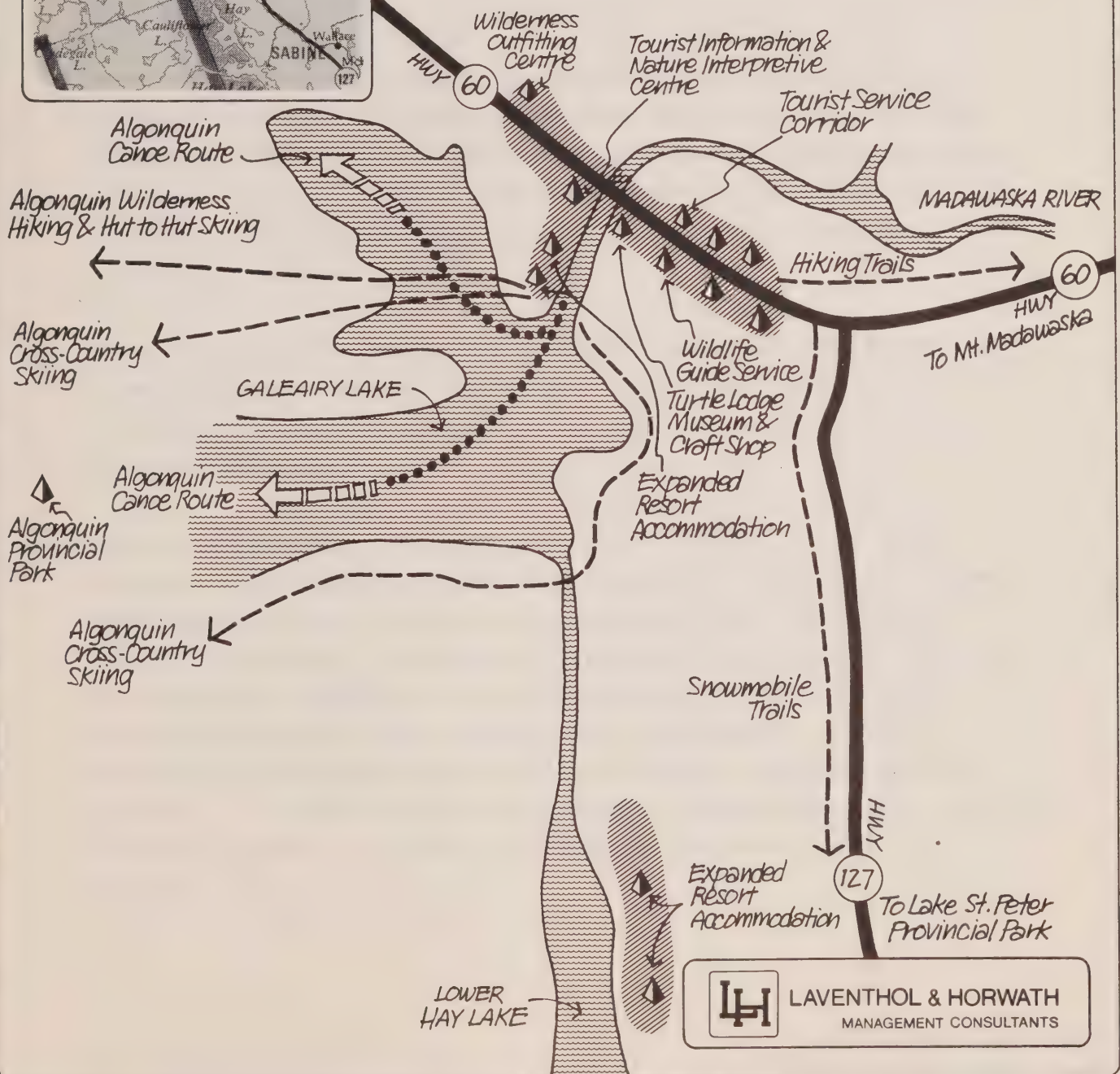
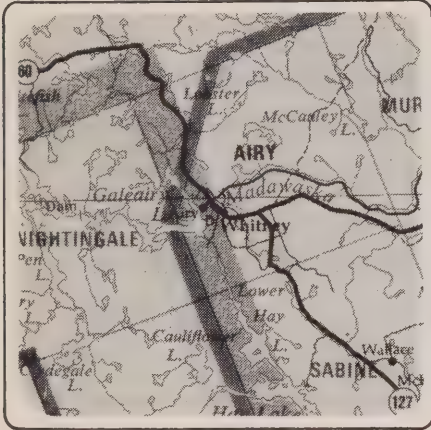
TABLE 4.7
DEVELOPMENT OPPORTUNITIES

WHITNEY

OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Permanent Tourist Information Centre	- provide necessary service - encourage extended stay by increasing awareness of area's amenities	- all visitors		- year round	- low	- operation - funding	- planning - funding - development	- good	- high quality facility - include picnic area
Interpretive Centre	- introduce visitors to park environment and enhance their enjoyment of park - encourage extended stay by increasing awareness of area's resources	- provincial - international	- tour groups - school groups - park users	- spring - summer - fall	- low	- promotion	- planning - funding - development - operation - promotion	- good	- can be part of information centre - include audio-visual presentation, displays, literature - emphasis on natural environment
Expanded Outfitting & Guiding Services	- encourage extended stay - improve range of services to tourists	- provincial - international	- hikers - cross-country skiers - photographic enthusiasts - birdwatchers	- year round	- medium	- funding - development - operation - promotion	- promotion	- very good	- develop trips catering to these specialty markets - package to include accommodation, equipment, instruction for guiding - set controllable standards are required for guides
Hut-to-hut Skiing	- consistent with accessible wilderness theme - extend range of recreational opportunities - encourage extended stay	- provincial - international	- skiers	- winter	- low	- funding - development - operation - promotion	- technical assistance - planning - promotion	- very good	- could utilize trails in Algonquin Park - could development a trail between Whitney, Barry's Bay and/or Bancroft
Arts and Crafts Shop and Mini Lumbering Museum	- extend range of services in Whitney - portray forest industry sub-theme and extend range of attractions in Whitney	- local - regional - provincial - national - international	- tour groups - park users - resort guests - school groups	- year round	- medium	- funding - development - operation - promotion	- technical assistance - planning - promotion	- good	- feature work of local artisans - could be housed in museum building - acquire Turtle Lodge for this purpose
Expand Resort Accommodation	- meet needs of market - increase facilities required for extended stay vacation	- provincial - international	- tour groups - outdoor recreational enthusiasts	- year round	- medium	- funding - planning - development - operation - promotion	- promotion	- very good	- include food and beverage, entertainment and recreation facilities

WHITNEY Day use/Extended stay

4.5



LAVENTHOL & HORWATH
MANAGEMENT CONSULTANTS

BARRY'S BAY/MT. MADAWASKA DEVELOPMENT STRATEGY

DEVELOPMENT ORIENTATION - EXTENDED STAY

DEVELOPMENT THEME - LUMBERING/CULTURE

Barry's Bay is located at the intersection of Highways 60 and 62, approximately a one hour drive east of Algonquin Park. The area is sparsely populated and characterized by rugged, wooded terrain and numerous lakes and rivers. These natural resources create an ideal environment for outdoor recreation activities in an accessible wilderness setting.

Tourists are currently attracted to the Barry's Bay region by its relatively undeveloped character. Fishing, hunting, hiking, sailing, canoeing, snowmobiling and cross-country and downhill skiing are typical visitor activities. Limited cottage and commercial accommodation development has occurred, mainly on the shores of Lake Kamaniskeg to the south of the village.

The strategy for the Barry's Bay development node involves encouraging extended stay visitation. The rationale for this strategy is based both on the natural resource base and on the area's distance from major Ontario urban markets.

The key target market, in terms of geographic origin, is the Ontario resident, especially the Eastern Ontario segment. American and European tour groups can also be attracted to the area, due to the appeal of the natural environment. The level of visitation from the latter two groups will not be as significant as that of the Ontario resident. Efforts should be targeted at those tourists who are interested in outdoor recreational activities such as sailing, downhill skiing and whitewater canoeing. It is expected that these special interest groups will consist primarily of middle to upper income families and young (under 40) adults.

"Accessible wilderness" constitutes the major theme for the Barry's Bay area. The development intent is to expand existing facilities and attractions and to create new ones consistent with this theme. New attractions should be integrated with existing developments such that the resulting package will generate a sufficient volume of tourist traffic to support expansion of the accommodation and foodservice sectors on a year-round basis.

Sub-themes are related to the lumbering industry and the Polish cultural heritage. Barry's Bay was originally established as a lumber camp and is the oldest Polish settlement in Canada. These early settlers were given free land in the area in exchange for their labour on the Opeongo Colonization Road.

Development Opportunities

Specific details of proposed development opportunities are discussed in Table 4.8 and presented conceptually in Exhibit 4.6.

The village of Barry's Bay should continue to act as a local service centre for tourism activities. The focus of development should be in the Mt. Madawaska - Lake Kamaniskeg area and should emphasize increasing the attraction of Mt. Madawaska as a destination and extending and improving the range of services offered to visitors in Barry's Bay.

In order to accommodate tour groups on a year-round basis, the existing resort accommodation in the Mt. Madawaska area should be expanded and winterized. Consideration should be given to including recreation facilities such as indoor swimming pools, saunas and tennis courts. In addition, an arts and craft shop, quality restaurant, chairlift-skyride and picnic area should be provided at the base of Mt. Madawaska in order to create a more exciting and "alive" draw to the site.

Proposed development of the shoreline area adjacent to Mt. Madawaska should facilitate public access to the water. This waterfront zone will

be the focus of a variety of day-use activities and facilities will provide the necessary equipment and instruction for these water-oriented pursuits. Development opportunities which should be considered for this area include a sailing and windsurfing centre, an outdoor education and wilderness adventure centre capable of handling 100 visitors at a time, and an expansion of accommodation services.

In the village of Barry's Bay, emphasis should be placed on the region's cultural and historic themes. It should stress the unique contribution to early development made by lumbermen, colonization road settlers and the railway. The railway water tower, the Balmoral Hotel, the site of the original lumber camp settlement and the railroad and colonization road routes should all be marked with interpretive signage. These heritage resources can form the basis of a village walking tour. Other developments consistent with local themes could include a lumbering festival, church suppers, a Polish ethnic festival and a tour of the lumber company.

An improved tourist information centre and a wilderness outfitter and guide service would contribute to extending and improving the quality of visitor services in the village. The waterfront park development including a beach, boat docking and picnic area will improve the visual appeal of the village. It will provide shore access to those visitors interested in more passive uses of the waterfront than those found at the Mt. Madawaska centre.

The Madonna House Pioneer Museum in Combermere, Shrine Hill and the Polish Museum in Wilno, remains of the colonization road settlement in Renfrew County and Carson Lake Provincial Park are all attractions in the Barry's Bay area which are complementary to the themes of the development node. Linkages should be developed with these attractions via hiking, cross-country skiing and snowmobile trails and scenic automobile tours. For this purpose, use can be made of colonization roads and any abandoned rail rights-of-way.

All proposed development opportunities for Barry's Bay assume that preservation of the natural and heritage resources is of key importance. The level of development is intended to be consistent with local objectives and human resource capabilities. It is expected that the local government will be intimately involved in the planning and development process.

TABLE 4.8
DEVELOPMENT OPPORTUNITIES
BARRY'S BAY/MT. MADAWASKA

OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Chairlift/Skyride at Mt. Madawaska	- improve attractiveness of Mt. Madawaska - increase range of attractions to encourage extended stay visitation - promote four season use of mountain	- local - regional - provincial	- downhill skiers - tour groups - cottagers - lodge guests	- year round	- low	- development - operation - promotion	- technical assistance - planning - funding - promotion	- very good	- downhill skiers increasingly expect all ski areas to have a chairlift
Lookout Park - top of Mt. Madawaska	- improve sky-ride experience	- local - regional - provincial	- sky-ride users	- spring - summer - fall	- low	- development - operation - promotion	- technical assistance - planning - funding - promotion	- very good	- with inclusion of interpretive signage and a telescope, this park can serve to orient visitors to the area
Sailing and Windsurfing Centre	- consistent with outdoor recreation orientation - serves as an attraction which can extend visitor stays	- local - regional - provincial - U.S. - international	- sailors - windsurfers	- spring - summer - fall	- low	- funding - development - operation - promotion	- promotion	- very good	- adjacent to Mt. Madawaska, offering equipment rental and instruction
Hang-gliding School - Mt. Madawaska	- extend visitor stays - increase four season use of mountain - consistent with outdoor recreation orientation	- local - regional - provincial - U.S. - international	- hang-gliding enthusiasts	- spring - summer - fall	- low	- funding - development - operation - promotion	- promotion	- good	- activity also has spectator appeal
Ice Fishing and Open Water Fishing Services	- consistent with outdoor recreation orientation - four season activity - appropriate use of natural resource base - encourage extended stay	- regional - provincial - U.S.	- fishermen	- year round	- medium	- funding - development - operation - promotion	- promotion	- very good	- service should provide boat, hut and equipment rental and supplies
Whitewater Centre	- encourage extended stay - consistent with accessible wilderness theme - appropriate use of natural resource	- regional - provincial - national - U.S.	- canoeists - kayak users - tour groups	- spring - summer - fall	- medium	- funding - development - operation - promotion	- promotion	- good	- should offer outfitting, instruction and escorted tours - ticket agent at Mt. Madawaska, centre located near Madawaska River whitewater

TABLE 4.8
DEVELOPMENT OPPORTUNITIES
BARRY'S BAY/MT. MADAWASKA
(continued)

OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Interpretive Walking Tour of Village	- capitalize on local heritage themes	- local - provincial - U.S. - international	- historical enthusiasts - tour groups - school groups	- year round	- low	- promotion	- planning - funding - technical assistance - development - promotion	- very good	- include railway water tower, Balmoral Hotel, Opeongo Road, site of original lumber camp settlement, lumber mill - self-guiding interpretive brochure - interpretive signage
Lumber Company Tour	- reinforce heritage theme - enhance extended stay appeal of area	- local - regional - provincial - U.S. - international	- tour groups - school groups	- year round	- low	- development - operation - promotion	- liaison - promotion	- good	- depends on co-operation of company management
Waterfront Park	- improve visual appeal of community thus enhancing extended stay opportunities	- local - provincial - U.S. - international	- boaters - children	- summer	- low	- promotion	- planning - funding - development - operation - promotion	- very good	- include docking, beach, picnic area
Church Suppers	- enhance extended stay appeal of area - capitalize on Polish cultural theme and key role of church in community	- local - regional - provincial - U.S. - international	- tour groups - lodge guests - cottagers	- year round	- low	- funding - development - operation - promotion	- promotion	- good	- requires co-operation of local churches
Hiking/Cross-Country Skiing Trail	- opportunity to present colonization road heritage theme - consistent with accessible wilderness theme - encourage extended stay	- local - regional - provincial - U.S. - international	- hikers - skiers - school groups - tour groups	- year round	- medium	- planning - funding - development - operation - promotion	- promotion	- very good	- use Opeongo Road and side roads where possible - could eventually be linked to Algonquin Park and Renfrew - include shorter loops for flexibility
Wilderness Outfitter and Guide Service	- serve users of above trail	- provincial - U.S. - international	- hikers - skiers - school groups - tour groups	- year round	- medium	- development - operation - promotion	- promotion	- good	- could be used to present interpretive material on Opeongo Road - guide maps, audio-visual show

TABLE 4.8
DEVELOPMENT OPPORTUNITIES
BARRY'S BAY/MT. MADAWASKA
(continued)

<u>OPPORTUNITY</u>	<u>STRATEGY RELATIONSHIP</u>	<u>GEOGRAPHIC MARKET</u>	<u>SPECIALTY MARKET</u>	<u>SEASON</u>	<u>REGIONAL COMPETITION</u>	<u>ROLE OF PRIVATE SECTOR</u>	<u>ROLE OF GOVERNMENT</u>	<u>DEVELOPMENT POTENTIAL</u>	<u>FURTHER COMMENTS</u>
Wilderness Adventure Centre	- consistent with accessible wilderness theme - increase extended stay opportunities	- provincial - U.S. - international	- school groups - tour groups - canoeists - hikers - skiers - seasonal users	- year round	- low	- funding - development - operation - promotion	- promotion	- good	- similar to Outward Bound schools - could offer short courses as well as one and two-week sessions
Polish Theme Restaurant	- serve market generated by area recreational developments - consistent with heritage theme - enhance extended stay appeal of area	- local - regional - provincial - U.S. - international	- users of nearby recreational facilities - tour groups	- year round	- low	- funding - development - operation - promotion	- promotion	- good	- at Mt. Madawaska
Expand and Upgrade Accommodation	- serve market generated by area recreation developments - enhance extended stay appeal of area	- provincial - U.S. - international	- tour groups - outdoor recreational enthusiasts	- year round	- medium	- funding - development - operation - promotion	- promotion	- very good	- those facilities which could cater to extended stay visitors, near Mt. Madawaska - include pools, saunas, tennis courts
Arts and Crafts Shop	- serve market generated by area recreational developments	- local - regional - provincial - U.S. - international	- tour groups - transient auto traffic	- year round	- low	- funding - development - operation - promotion	- promotion	- good	- at Mt. Madawaska - feature local artisans
Visitor Information Centre	- provide needed service to existing and expanding tourist market	- provincial - U.S. - international		- year round	- low	- operation	- planning - funding - technical assistance - development	- very good	- ideal location is old train station possibly staffed by seniors who now have club in station
Picnic Park	- provide needed service to tourist market - give community exposure to transient traffic	- local - regional - provincial		- summer	- medium		- planning - funding - development - operation	- good	- adjacent to information centre

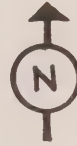
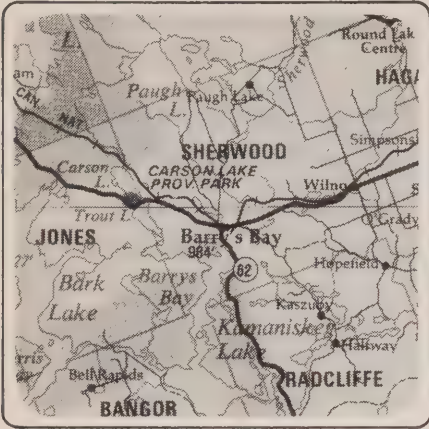
TABLE 4.8
DEVELOPMENT OPPORTUNITIES
BARRY'S BAY/MT. MADAWASKA
 (continued)

<u>OPPORTUNITY</u>	<u>STRATEGY RELATIONSHIP</u>	<u>GEOGRAPHIC MARKET</u>	<u>SPECIALTY MARKET</u>	<u>SEASON</u>	<u>REGIONAL COMPETITION</u>	<u>ROLE OF PRIVATE SECTOR</u>	<u>ROLE OF GOVERNMENT</u>	<u>DEVELOPMENT POTENTIAL</u>	<u>FURTHER COMMENTS</u>
Mini-bus Tour	- opportunity to present heritage themes - encourage extended stay	- provincial - U.S. - international	- tour groups - school groups	- year round	- low	- development - operation - promotion	- planning - promotion	- good	- route could include village, colonization roads, Wilno, Bonnechere Caves, Madonna House, Pioneer Museum at Combermere
Scenic Auto Tour	- as above	- regional - provincial - U.S. - international		- year round	- low	- promotion	- planning - promotion - development	- very good	- same route as bus tour - requires development of interpretive guide map
Timber Festival	- consistent with heritage theme - enhance extended stay appeal	- local - regional - provincial	- tour groups	- spring	- low	- funding - planning - development - operation - promotion	- promotion	- very good	- expand activities of existing festival
Polish Festival	- consistent with heritage theme - enhance extended stay appeal	- local - regional - provincial	- tour groups	- fall	- low	- funding - planning - development - operation - promotion	- promotion	- very good	- feature food, music, dance, sports, arts and crafts of Polish people

BARRY'S BAY / MT. MADAWASKA

4.6

Extended stay



Opeongo Road
Hiking and Ski Trail

Lumber Company Tour

Railway Station
Tourist Information Center

HWY 60

Carson Lake
Provincial Park

Wilderness Outfitter
and Guide Service

Ethnic Festival

Church Supper

Lumber Camp Settlement
Display Center

Railway
Water Tower

Balmoral Hotel
Historic Display

Cross-Country Skiing
and Hiking Trail

Picnic Area

Beach Area

Boat
Docking

Lumber
Festival

Ice Fishing

Sport Fishing

Accommodation
Expansion

Sailing and
Windsurfing Center

Docking

Outdoor Education
and Wilderness
Adventure Center

Fishing

Fishing Services

Whitewater Rafting and
Canoeing Center

Arts and Craft Shop

Ethnic Themed
Restaurant

Chairlift and Skyride

Ski Hill

Scenic Lookout

Hang-gliding Center

Picnic Area

To Combermere and
Madonna Pioneer Museum

HWY 62



LAVENTHOL & HORWATH
MANAGEMENT CONSULTANTS

PETERBOROUGH DEVELOPMENT STRATEGY

DEVELOPMENT ORIENTATION - DAY-USE/OVERNIGHT

DEVELOPMENT THEME - WATER-ORIENTED URBAN TOURISM

Peterborough's location in east-central Ontario makes it the largest urban centre in the study area which is readily accessible to both the heavily populated Golden Horseshoe and the major cities of Eastern Ontario. Peterborough is also the only centre within the study zone to which visitors may arrive by automobile, scheduled bus, rail, airline or boat. It is the southeastern gateway to the Kawartha Lakes vacation region and the major link in the Trent-Severn Waterway. The natural and heritage resources of Peterborough provide an excellent setting for water-oriented recreation within an urban environment. Those attractions creating the greatest draw are the Hydraulic Lift Lock, STP Kawartha International Snowmobile race, Lift Lock Cruises and the Trident Underwater Club Ice Flow Race.

Peterborough also has a number of important historical resources. In prehistoric times, the site of Peterborough served as one end of the Otonabee-Chemong portage. Later, it became the landing place for early European and American settlers using the Port Hope-Rice Lake overland route. Peterborough became an "instant" settlement when Peter Robinson brought 2,000 Irish immigrants to the area in 1825. Sawmilling resulted in rapid growth in the 1850's and 60's. It led to the development of the transportation infrastructure which serves its diversified manufacturing and service based economy today. Hutchison House (built in 1837), the Grover-Nicholls House (begun in 1847) and the Market Hall Tower are all fine examples of nineteenth century architecture.

The tourism development intent for Peterborough is to expand and improve the existing facilities, attractions and services in order to create a water-oriented urban environment which can attract a greater number of day-use and overnight visitors throughout all seasons of the year. New attractions and facilities should complement those already in place. The

outlined development opportunities should promote Peterborough as a focus for incoming tours and a launching point for further penetration into the surrounding area.

Important tourist markets for Peterborough should be the surrounding region; Ontario residents, particularly those from Metropolitan Toronto, the Golden Horseshoe, Kingston and Ottawa; other Canadians; American residents; and international travellers. As a major focal point on the Trent-Severn System, visitors from the U.S. and overseas will find Peterborough to be an exciting tourism centre. Among the key specialty markets to be targeted are tour groups, boaters, snowmobilers, transient campers and history enthusiasts.

Development Opportunities

The proposed tourism development opportunities in Peterborough (Exhibit 4.7) evolve around three distinct activity centres. These activity focal points become progressively more urban-oriented as they approach the city core. All three are related to the water resource base in Peterborough.

Proximate to Lock 20 but linked to the lift lock by means of a nature/walking trail should be a recreation park. Included within the park should be a beach, restrooms/change house, paddle boat concession and vita parcour. The park will be used by local residents, transient auto passengers and transient boaters. Boaters wishing to reach the park will dock at Lock 20 and follow the walking trail to the park. Each vita parcour station will be designed to challenge the participant without providing a set routine. A waterfront picnic park, adjacent to Lock 20, will provide boaters not interested in the facilities within the recreation park an opportunity to picnic. Auto travellers using these picnic tables will be afforded a view of the locks, boater activity on Little Lake, as well as a distant view of the marina and Centennial Fountain. It is anticipated that the activity around the marina and the market centre will entice a number of the transient boaters who had not staying considered overnight in Peterborough, to do so.

Below the lift lock will be an activity centre/exhibition area. The buildings will be constructed so as not to detract from the image of the lift locks. Contained in the centre will be an indoor theatre providing an audio-visual presentation of the development and construction of the different types of locks on the Trent-Severn system, the changes which have taken place since the time of their construction and an indication of the social, cultural and economic impact on the surrounding area. Books and other printed literature on the locks should also be available at this centre. Photographs and artifacts from earlier lock periods could adorn the walls. The building should contain washrooms and foodservice facilities. The exhibition space could also be used by the Chamber of Commerce, Central Ontario Travel Association, Otonabee Region Conservation Authority and Kawartha Conservation Authority to display material on the Peterborough region.

Upgrading the docking facilities at Beavermead Park would provide overnight boating with an alternate means of accommodation.

A marina containing 150 slips should form the focal point for the second activity centre. The development should include launching ramps, dry docking, storage areas and repair services, water, electricity, a pump-out system, and fuel. Care should be taken to ensure that all types of boating craft can be accommodated. Although designed primarily as a day-use marina to attract transient boaters to Peterborough, initially at least 30% of the slips should be available on a seasonal basis. The number of berths provided for transient boaters can be increased if warranted. A training school providing a full range of boating lessons should be included in association with the present Sea Scouts building. The marina should also promote regattas, host the annual hydroplane race on Little Lake and act as a tour centre for the lift lock cruises, as well as the tour boat and steamer cruises to Rice Lake and the upper Kawarthas. At least two of the planned boat cruises for the study zone could stop in Peterborough. (See pages 248 to 252 in this Volume.) One cruise would allow passengers to disembark at this location for lunch and

shopping. The other tour would be designed for an overnight stay in Peterborough, in which case the boat would dock in time for dinner and depart after breakfast the following morning.

Overnight docking, adjacent to the marina, should be expanded and upgraded to complement the upgrading of the waterside food and beverage operations. A boardwalk should link this activity centre with the one within the city core. To complement the marina development and create an integrated package, the nearby market plaza should be cosmetically upgraded. Marina-oriented commercial outlets could be encouraged to locate here. A proposed bandshell located in the vicinity of the marina and art gallery would provide an additional attraction for local residents, transient auto and boater traffic, overnight boaters, cottagers and hotel guests.

When room-night demand in Peterborough increases beyond the capacity of the presently available accommodation facilities consideration should be given to establishing a hotel, restaurant and small convention centre complex proximate to the marina. Until such time as this occurs, a landscaped parking area for the marina should be considered.

The third activity centre within the Peterborough development node should be located at the edge of the Otonabee River near Charlotte and Water Streets. Included as integral attractions should be an arts and crafts market, bull market, amphitheatre, boutiques, sunken gardens, boat docking, bicycle and boat rentals. The area should be linked to the historical walking tour and the canoe museum by a walking path or trail. A summer festival including musical performances, dances, aquatic performances and displays could focus on this area. Themes for the festival might include Peter Robinson and the Irish heritage of Peterborough. The amphitheatre could be used to present both musical and open-area theatrical performances as well as interpretive programmes dealing with the Trent-Severn Waterway, Peterborough and the surrounding area. A canoe, paddle and other small boat rental outlet would allow transient auto travellers and hotel guests to explore the Otonabee River

and Little Lake. Paddle boats should be restricted from travelling near the marina or on Little Lake.

Riverfront boutiques with themed facades should back onto the buildings facing Water Street. A variety of high quality merchandise could be offered from these outlets. Complementing the boutiques should be a high quality arts and crafts market promoting the work of local artisans and possibly affiliated with the Whetung Craft Centre. The area could also provide a bull market travelling throughout the area, offering a variety of confectionery, floral and specialty food items. Spread throughout this development area should be a series of sunken gardens displaying all the indigenous flowers, plants and trees.

The boat docking associated with the rental area would also allow those visitors who own small transient craft that can pass under the CPR bridge to the south of this development area to tie up and spend the day or evening walking through existing tourist areas as well as central Peterborough.

A walking tour of the central business district and adjacent streets could include the shopping mall and the historic buildings: Hutchison House, St. John's Church, the Court House, the Market Hall Tower and the Grover-Nicholls House. Dispersed along the tour should be a number of cafes offering a variety of specialty menus which focus on the cultural heritage of Peterborough. During the summer months, the cafes could provide sidewalk tables and outdoor entertainment.

Peterborough should also be the centre for a number of tours destined to the surrounding areas. The downhill ski areas at Bethany are within the day-use area of visiting tourists, as are Kawartha Downs, Century Village, Whetung Indian Craft Centre and the scenic and heritage tour to Lakefield.

A winter carnival emphasizing Peterborough's attractiveness as an outdoor winter recreation area should also be considered as a development

opportunity. Designed to draw spectators and competitors from other areas, the winter carnival could feature sno-cross, snow/ice sculpturing, sleigh rides and hockey tournaments. As well, marathons on ice could take place between the lock stations. Morrow Park could be the location for sno-cross and snowmobile slaloms.

Details of the development opportunities for Peterborough are summarized in Table 4.9.

TABLE 4.9
DEVELOPMENT OPPORTUNITIES
PETERBOROUGH

OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Historical Walking Tour of City	- increase range of attractions - extend day-use potential - capitalize on local heritage themes	- provincial - national - U.S.	- historical enthusiasts - tour groups - transient auto traffic - school groups - transient and over-night boater traffic	- year round	- medium	- promotion	- planning - funding - development - technical assistance - promotion	- good	- include Hutchesson House, St. John's Church, Court House, Masonic Temple, and Clock Tower - interpretive signage - signage at each historical site
Cafes	- increase services to tourists - improve and extend day-use and overnight stay potential	- local - regional - provincial - national - U.S.	- transient auto traffic - transient boater traffic - tour groups	- year round	- medium	- planning - funding - development - operation - promotion	- promotion	- good	- open air or sidewalk cafe during summer
Amphitheatre	- increase range of attractions - improve day-use potential	- local - regional - provincial	- school groups - tour groups - transient auto traffic - transient boater traffic - hotel guests	- spring - summer - fall	- low	- promotion - operation	- planning - funding - development - promotion - operation	- good	- present information on waterway - history of Peterborough - information on surrounding area attractions
Canoe, Paddle Boat, Bicycle Rental Centre	- improve services to tourists - improve and extend day-use and overnight stay potential	- provincial - national - U.S.	- canoeists - cyclists - transient auto traffic	- spring - summer - fall	- medium	- planning - funding - development - operation - promotion	- promotion	- good	- interpretive guide and information on local trails
Riverfront Boutiques	- improve services to tourists - improve and extend day-use and overnight stay potential - enhance waterway theme within urban environment	- local - regional - provincial - national - U.S.	- tour groups - transient auto traffic - transient and over-night boater traffic - local pedestrian traffic - hotel guests	- all year	- low	- planning - funding - development - operation - promotion	- promotion	- good	- ideal location facing Otonabee River at rear of buildings on Water Street - high quality merchandise - themed fronts

TABLE 4.9
DEVELOPMENT OPPORTUNITIES
PETERBOROUGH
(continued)

OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Boat Docking	- improve services to tourists - improve and extend day-use and overnight stay potential - enhance waterway theme within urban environment - complement other nearby attractions	- regional - provincial - national	- transient and over-night boater traffic	- spring - summer - fall	- medium	- funding - promotion	- planning - development - funding - operation - promotion	- good	- restricted to those boats clearing CPR bridge
Sunken Gardens	- improve waterfront image - increase range of attractions - improve and extend day-use potential	- local - regional - provincial	- tour groups - transient auto traffic - transient and over-night boater traffic - hotel guests - naturalists - sightseers/ photographers	- summer	- low	- promotion	- planning - development - funding - operation - promotion	- good	- landscaping would complement urban and waterway environments
Arts and Crafts Market	- increase range of attractions - improve and extend day-use potential - increase services to tourists	- regional - provincial - national - U.S.	- tour groups - transient auto traffic - transient and over-night boater traffic - hotel guests	- year round	- medium	- planning - development - funding - operation - promotion	- promotion	- good	- feature local artisans - tie in with Whetung Craft Centre and Rice Lake Indian Craft Centre
Bull Market	- increase range of attractions - improve and extend day-use potential	- local - regional - provincial	- school groups - local pedestrian traffic - transient auto traffic - transient boater traffic	- summer - fall	- low	- development - funding - operation - promotion	- promotion	- good	- create feeling of activity
Summer Festival	- increase range of attractions - improve and extend day-use and overnight stay potential - opportunity to present heritage theme	- local - regional - provincial	- tour groups - transient auto traffic - transient and over-night boater traffic - local pedestrian traffic	- summer	- low	- planning - funding - promotion	- planning - development - operation - funding - promotion	- good	- expand on present festival - Irish theme - Peter Robinson Settlement

TABLE 4.9
DEVELOPMENT OPPORTUNITIES
PETERBOROUGH
(continued)

OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Boardwalk	- linkage with other area attractions	- local - regional - provincial - national - U.S.	- transient and over-night boater traffic - transient auto traffic	- spring - summer - fall	- low	- funding - development - promotion	- planning - development - funding - promotion	- good	- link municipal marina area with central business district - complement other tourist facilities
Upgraded Waterside Food and Beverage Operation	- provide needed service for tourists - improve and expand variety of dining experiences available - improve and extend day-use and overnight stay potential	- local - regional - provincial - national - U.S.	- tour groups - transient auto traffic - hotel guests - transient and over-night boater traffic	- year round	- medium	- development - operation - funding - promotion	- promotion	- good	- access for transient and overnight boater traffic important
Upgrade and Expand Boat Docking	- provide needed service for tourists - increase facilities available to tourists - improve and extend day-use potential	- regional - provincial - national - U.S.	- transient and over-night boater traffic	- spring - summer - fall	- medium	- planning - development - funding - operation - promotion	- promotion	- good	- complement food and beverage and accommodation facilities
Marina	- improve services to tourists - improve and extend day-use and overnight stay potential - encourage penetration of area	- local - regional - provincial - national - U.S.	- transient and over-night boaters - fishermen	- spring - summer - fall	- low	- planning - development - operation - promotion	- planning - development - funding - promotion	- very good	- proximity to Market Plaza and central business district an advantage - include full services - launching area
Overnight Boat Docking	- provide needed service for over-night boaters - increase quantity of services - improve and extend overnight stay potential	- regional - provincial - national - U.S.	- overnight boater traffic	- spring - summer - fall	- medium	- development - funding - operation - promotion	- planning - development - funding - promotion	- very good	- complement day use marina facilities
Upgrade Parking	- increase facilities available to tourists - improve and extend day-use and overnight stay potential	- local - regional	- transient and over-night boater traffic - tour groups (boats) - transient auto traffic - sailors - fishermen	- spring - summer - fall	- medium	- development - funding - operation - promotion	- planning - development - funding - promotion	- good	- necessary to complement increased docking and marina facilities

TABLE 4.9
DEVELOPMENT OPPORTUNITIES
PETERBOROUGH
(continued)

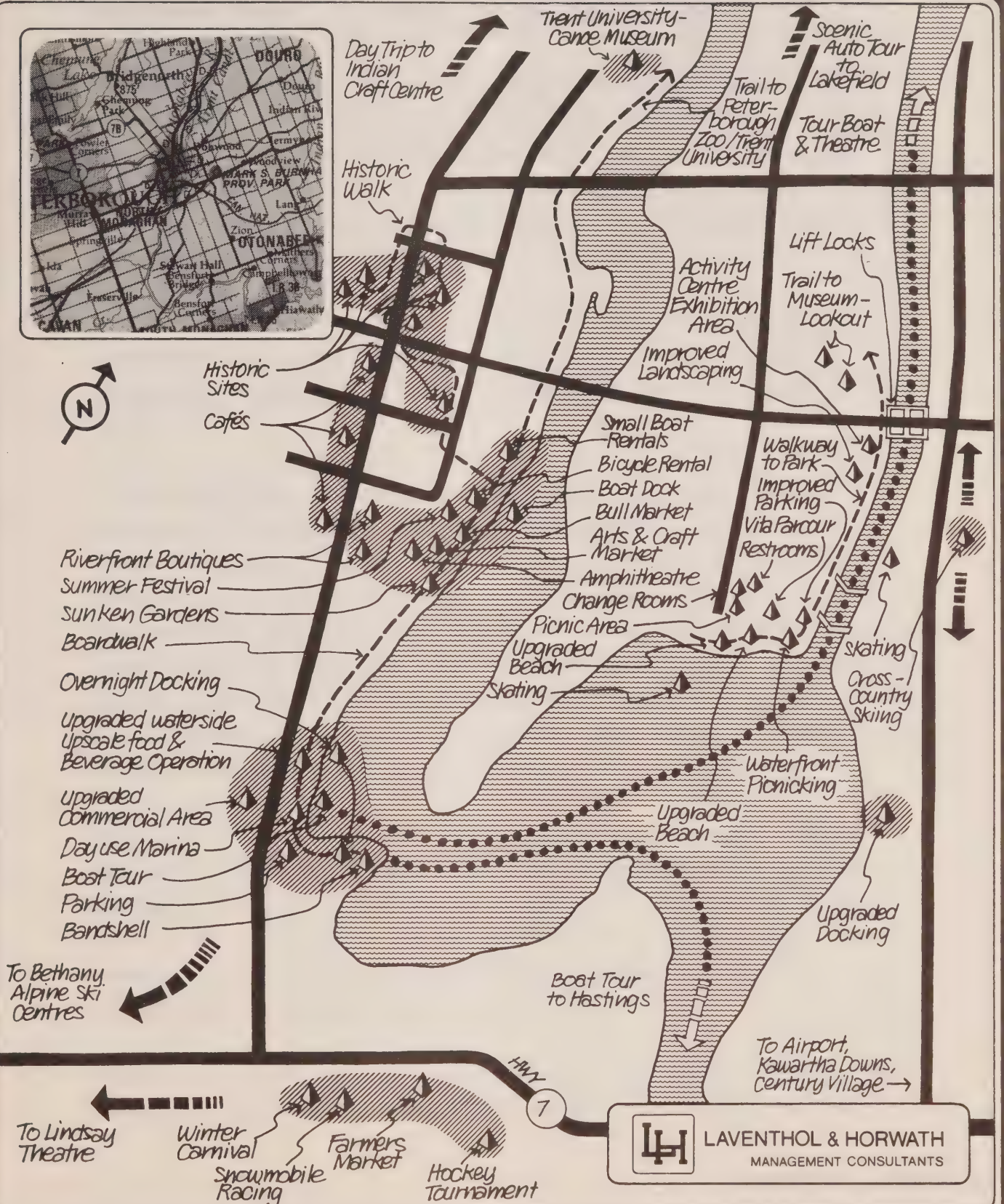
OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Bandshell	- increase range of attractions - improve and extend day-use and overnight stay potential	- local - regional - provincial - national - U.S.	- transient auto traffic - transient and over-night boater traffic - tour groups - cottagers - hotel guests	- spring - summer - fall	- low	- promotion	- planning - development - funding - operation - promotion	- good	- tie in with summer festival - music competitions
Upgrade Docking (Beavermead Park)	- increase services available to tourists - improve and extend day-use and overnight stay potential	- regional - provincial - national - U.S.	- transient and over-night boater traffic - transient campers	- spring - summer - fall	- low	- promotion	- planning - development - funding - operation - promotion	- good	- provide overnight camping opportunities to boaters
Winter Carnival	- increase range of attractions - extend season length - improve and extend day-use potential	- local - regional - provincial	- winter recreation enthusiasts	- winter	- medium	- planning - development - funding - promotion	- planning - development - funding - operation - promotion	- good	- tie in with STP Kawartha International Races - snow/ice sculpturing, sleigh rides, sno-cross, hockey tournament
Waterfront Picnic Park	- improve services to tourists - improve and extend day-use potential - linkage with Trent Severn Waterway corridor	- regional - provincial - national - U.S.	- transient auto traffic - transient and over-night boaters	- spring - summer - fall	- medium		- planning - development - funding - operation - promotion	- good	- complement other proximate facilities - improved parking required
Recreation Park	- encourage urban tourism - improve and extend day-use potential - improve services to tourists - enhance urban tourism/waterway relationship	- local - regional - provincial - national - U.S.	- transient and over-night boater traffic - transient auto traffic - school groups	- year round	- medium	- promotion	- planning - development - funding - operation - promotion	- good	- include upgraded beach, change house/rest room, vista parcouir, picnic area, skating during winter
Nature/Walking Trail	- increase range of attractions - linkage with other area attractions - improve and extend day-use potential - consistent with accessible scenic waterway theme	- local - regional - provincial - national - U.S.	- hikers - naturalists - transient and over-night boater traffic	- year round	- low		- planning - development - funding - operation - promotion	- good	- landscaped - linkage with Lock 20, lift locks, recreation area, activity centre and lookout

TABLE 4.9
DEVELOPMENT OPPORTUNITIES
PETERBOROUGH
(continued)

<u>OPPORTUNITY</u>	<u>STRATEGY RELATIONSHIP</u>	<u>GEOGRAPHIC MARKET</u>	<u>SPECIALTY MARKET</u>	<u>SEASON</u>	<u>REGIONAL COMPETITION</u>	<u>ROLE OF PRIVATE SECTOR</u>	<u>ROLE OF GOVERNMENT</u>	<u>DEVELOPMENT POTENTIAL</u>	<u>FURTHER COMMENTS</u>
Activity Centre/ Exhibition Area	- provide service to tourists - encourage penetration into area - improve and extend day-use and overnight stay potential - opportunity to present Trent Severn waterway history	- regional - provincial - national - U.S.	- transient and over- night boater traffic - transient auto traffic - hikers - tour groups - school groups	- spring - summer - fall	- low	- operation - funding - promotion	- planning - development - funding - operation - promotion	- very good	
Nature/ Walking/ Hiking Trail	- increase range of attractions - linkage with other area attractions - improve and extend day-use potential	- local - regional - provincial - national - U.S.	- hikers - cross-country skiers - naturalists - transient auto traffic - transient and over- night boater traffic	- year round	- medium	- planning - development - funding - operation - promotion		- good	- link central business district waterfront area with zoo and university

PETERBOROUGH Day use/Overnight

4.7



LAVENTHOL & HORWATH
MANAGEMENT CONSULTANTS

LINDSAY DEVELOPMENT STRATEGY

DEVELOPMENT ORIENTATION - DAY-USE, OVERNIGHT

DEVELOPMENT THEME - COMMERCIAL HERITAGE, RAILROAD

The town of Lindsay straddles the Scugog River between Sturgeon and Scugog Lakes. It is the second largest urban centre within the study zone and provides most amenities required by day-use and overnight tourists. Located as it is, south of Lake Sturgeon, Lindsay is not on a direct route for those boaters wishing to "sail" the Trent-Severn Waterway from Trenton to Port Severn or vice versa.

Founded in 1825 and originally known as Purdy's Mills, Lindsay was incorporated as a town in 1857. Unfortunately, none of Lindsay's original buildings survive today, in large part due to a disastrous fire in 1861.

By the end of the nineteenth century, Lindsay was a significant commercial, financial and industrial centre heavily involved with industries related to lumbering. Evidence of Lindsay's industrial role survives in the form of mills and factories dating from the late nineteenth and early twentieth centuries. As well, there are a number of period homes, churches, and other buildings found throughout its streets. Lindsay's heritage is further emphasized by the width of its main street and the number of refurbished shop fronts. Kent Street is said to be one of the finest examples of early commercial streets in Ontario.

At present, Lindsay acts as a service centre for cottagers, campers, transient auto travellers and boaters providing many of the services not available at other smaller centres in the area. The Kawartha Summer Theatre, known nationally for its reputation as a leading summer stock company, and the Victoria County Historical Museum are important attractions in drawing tourists to the area.

Capitalizing on the natural resources of the area and its history, the development strategy for Lindsay is aimed at attracting day-use and

overnight visitation throughout the year. Among the specialty markets to be targeted are history enthusiasts, tour groups, school groups, boaters, outdoor recreation enthusiasts and those interested in the theatre.

Visitors from Ontario, particularly Metropolitan Toronto and south-central Ontario, will form the bulk of visitation to the area. The U.S. market and, to a lesser extent, those from the rest of Canada and overseas will form an important secondary market.

Related as it is to the Trent-Severn Waterway, the dominant tourism development theme for Lindsay should be the scenic waterway. Sub-themes should focus on commercial heritage, lumbering and the railroad. Development will take the form of expansion and diversification of existing tourist services and, where applicable, the creation of new services, facilities and attractions.

Development Opportunities

Because Lindsay's waterway heritage is the key attraction, any development which takes place must be consistent with the aim of emphasizing yet preserving the area's natural and historical resources. The intention is to provide visitors with day-use and overnight opportunities within the waterway heritage environment which are not available in other areas or which complement and enhance those of other development areas.

Table 4.10 and Exhibit 4.8 illustrate the development opportunities appropriate for Lindsay. To capitalize on Lindsay's heritage as an early commercial centre, a streetscape should be created portraying the old banks, bookstores, saloons, theatres, millinery and variety stores, cafes and ice cream parlours. A Local Architectural Conservation Advisory Committee should be formed to ensure that the streetscape is a realistic joint venture by merchants and local governments. Further emphasizing the community's early history should be a self-guided walking tour which would include a stroll by such landmarks as St. Paul's Anglican Church, the Academy theatre, the Armoury, the Fire Hall, the Town Hall,

Cambridge United Church and Kent Street. Cafes should be located along the route to represent this early commercial business era and to improve the quantity and quality of food and beverage services available. A Heritage Festival could be tied in with the Victoria County Spring Festival of the Arts, with street dances, costume balls and period plays at the Academy Theatre. The event should focus on the development of Lindsay with each day's events based upon a different sub-theme such as lumbering, railroading and commerce.

A farmers market would attract local and regional cottagers, campers, transient auto travellers and boaters. A music festival in the fall, possibly before or after the agriculture fair, would serve to retain visitors in the area. Each year, a different type of music would form the overall theme. Musical pieces could be played which indicate the changes which have occurred over time in jazz, blue grass or rock.

Adaptive re-use of Lindsay Mills built in the late 1860's would provide Lindsay with a much needed upscale restaurant and hotel. Although a portion of the building was destroyed by fire in 1978, the shell is structurally sound. Located close to the Lindsay locks and Lindsay Street, the building is ideally situated as an overnight stop for theatre guests and transient auto and boater traffic. Development of the building as a themed restaurant and hotel will complement the heritage of Lindsay while increasing the use of the waterfront area. An appropriate facilities mix, as outlined below, will enable the proposed hotel to capture a share of the conference market and the escape weekend market in the non-summer months.

Development particulars which appear to be suitable for this project include:

- 35 to 45 guest rooms
- 125-seat restaurant, with terrace
- 60-seat lounge

- 3 conference rooms seating 30 to 50 persons each
- Whirlpool, sauna and hot tub

A marina containing slips for at least 75 boats, ranging from power cruisers to sailing craft, run-abouts and small dinghies should be located near the hotel. Services should include water, electricity, gasoline products, a pump-out, repairs, boat launching gear, ramps and fishing supplies. While the marina will serve both seasonal and transient boaters, the primary orientation will be toward the seasonal boater. Less than a quarter of the berths should be allocated to transient boaters.

Adjacent to the marina and linked to the restaurant/hotel and marina by a riverside boardwalk should be Wilson Municipal Recreation Park. Lindsay has recently purchased the properties which are suggested for this development through funds willed to the municipality from the estate of the late Roy Wilson, owner and publisher of the "Post". The recreation park should include a creative play area, an outdoor pool, roller rink/ice skating rink, vita parcour and rest/change rooms. The area should be well landscaped in order to delineate both active and passive activity areas. To create a total waterfront package image, it will be necessary to relocate the Brewer's Retail Store and Smith Transport.

The boardwalk linking the park, marina, and hotel/restaurant complex should also lead to a boutique area fronting on Lindsay Street, the locks and the overnight docking area. A bicycle/walking trail to link this activity area with other riverside parks is suggested. A bicycle rental centre located near the overnight docking area would entice transient and overnight boaters to explore Lindsay. An additional tour emanating from Lindsay could include a well-signed scenic automobile route through O'Donnell Landing and along the east bank of the Scugog River to Port Perry. As well, a guided nature tour south along the Scugog River to Lake Scugog should include McLaren Creek - Goose Bay marshes, Scugog River marshes, Valentia marshes and Scugog marshes.

For those boaters not wishing to dine in the town core, a restaurant with suitable docking facilities should be located on the Scugog River to the north. The restaurant which could be frequented by transient traffic on the river or seasonal boaters from the Lindsay marina, should overlook the water, thereby allowing guests to view the boating activity on the river from a lounge or dining room.

Increased overnight accommodation should be considered. This could be provided by refurbishing one of the older hotels in the city. Any exterior renovations should, of course, complement the streetscape. The increased accommodation should complement the upscale accommodation to be provided in the old mill.

Scheduled boat cruises from Burleigh Falls and Bobcaygeon should stop overnight in Lindsay. Ideally, cruise packages would allow dinner and breakfast stops as well as opportunities to attend the summer theatre, take the historic walking tour or do some shopping. A scheduled boat tour from Fenelon Falls would allow passengers to disembark long enough to complete a walking or shopping tour.

A steam train operating between Lindsay and Fenelon Falls should be considered as another development opportunity associated with this node. While aboard the train, passengers could be entertained by musicians and a sing-a-long barbershop quartet. Sufficient time should be provided for those arriving from Fenelon Falls to see the area attractions. Through use of a central reservation system, passengers could purchase or exchange tickets for a later train or could return by cruise boat or steamer if Lindsay's attractions encouraged them to stay overnight.

TABLE 4.10
DEVELOPMENT OPPORTUNITIES
LINDSAY

OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Farmers Market	<ul style="list-style-type: none"> - increase range of attractions - increase services available to tourists and local residents - improve and extend day-use potential - linkage with agricultural hinterland 	<ul style="list-style-type: none"> - local - regional - provincial - national - U.S. 	<ul style="list-style-type: none"> - cottagers - transient auto traffic - transient and over-night boaters - transient and seasonal campers - tour groups 	<ul style="list-style-type: none"> - summer - fall 	- low	<ul style="list-style-type: none"> - development - funding - operation - promotion 	- promotion	- very good	
Steam Train	<ul style="list-style-type: none"> - encourage penetration into area - increase range of attractions - improve and extend day-use potential - opportunity to present heritage theme - linkage with other tourism development nodes 	<ul style="list-style-type: none"> - local - regional - provincial - national - U.S. 	<ul style="list-style-type: none"> - cottagers - tour groups (boats) - school groups - historical enthusiasts - steam train enthusiasts 	- summer	- low	<ul style="list-style-type: none"> - funding - development - operation - promotion 	<ul style="list-style-type: none"> - funding - promotion - liaison - technical assistance 	- good	<ul style="list-style-type: none"> - operate between Lindsay and Fenelon Falls - linked with boat and bus tours Lindsay, Rosedale and Kirkfield
Marine Restaurant	<ul style="list-style-type: none"> - improve services to tourists - improve and extend day-use and overnight stay potential 	<ul style="list-style-type: none"> - local - regional - provincial - national - U.S. 	<ul style="list-style-type: none"> - transient boater traffic - transient auto traffic 	- year round	- medium	<ul style="list-style-type: none"> - funding - development - operation - promotion 	<ul style="list-style-type: none"> - promotion - funding 	- good	- associated with overnight and day-use docking space
Historical Walking Tour of City	- capitalize on local heritage themes	<ul style="list-style-type: none"> - provincial - national - U.S. - international 	<ul style="list-style-type: none"> - historical enthusiasts - tour groups (boat and steam train) - school groups - transient auto traffic - transient and over-night boater traffic 	- year round	- low	- promotion	<ul style="list-style-type: none"> - planning - funding - development - technical assistance - promotion 	- very good	<ul style="list-style-type: none"> - include St. Paul's Anglican Church, Academy Theatre, Armoury, Fire Hall, Town Hall, Cambridge United Church and Kent Street - self guiding interpretive brochure - interpretive signage - signage at each historical site
Cafe	<ul style="list-style-type: none"> - increase services to visitors - improve and extend day-use and overnight stay potential 	<ul style="list-style-type: none"> - local - regional - provincial - national - U.S. - international 	<ul style="list-style-type: none"> - tour groups - transient auto traffic - historical enthusiasts - theatre guests 	- year round	- medium	<ul style="list-style-type: none"> - planning - funding - development - operation - promotion 	- promotion	- good	- should encompass heritage theme of Kent Street

TABLE 4.10
DEVELOPMENT OPPORTUNITIES
LINDSAY
(continued)

OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Themed Streetscape	- opportunity to present heritage theme - increase day-use potential - increase range of attractions - improve appeal of central business district to tourists	- regional - provincial - national - U.S. - international	- tour groups (boat and steam train) - school groups - historical enthusiasts - transient auto traffic - transient boat traffic	- year round	- low	- planning - funding - development	- planning - funding - technical assistance	- good	- form local architectural conservation area committee - joint venture by merchants and local government
Bicycle Rental Centre	- improve services to tourists - improve and extend day-use potential	- regional - provincial - national - U.S.	- cyclists - transient auto traffic - transient boater traffic	- spring - summer - fall	- low	- planning - development - funding - operation - promotion	- promotion	- good	- interpretive and information guide of local trails
Waterside Bicycle and Walking Trail	- increase facilities for outdoor recreational enthusiasts - improve day-use potential - linkage with other attractions	- local - regional - provincial - national - U.S.	- cyclists - transient auto traffic - transient boater traffic	- spring - summer - fall	- low	- promotion	- planning - development - funding - operation - promotion	- good	- along Trent Severn System to Marina Park
Scenic Auto Tour	- improve day-use and overnight stay potential - encourage penetration of area	- provincial - national - U.S.	- sightseers - transient auto traffic	- year round	- low	- promotion	- planning - development - promotion	- very good	- through O'Donnell Landing and along east bank Scugog River
Guided Nature Tour	- improve and extend day-use potential - consistent with scenic waterway theme - increase awareness of areas' natural resources	- local - regional - provincial - national	- naturalists - transient auto traffic - transient boater traffic	- summer - fall	- low	- development - funding - promotion	- planning - technical assistance - funding - promotion	- good	- should include McLaren Creek-Coose Bay Marshes, Scugog River Marshes, Valentia Marshes, Seagrave Marshes

TABLE 4.10
DEVELOPMENT OPPORTUNITIES
LINDSAY
(continued)

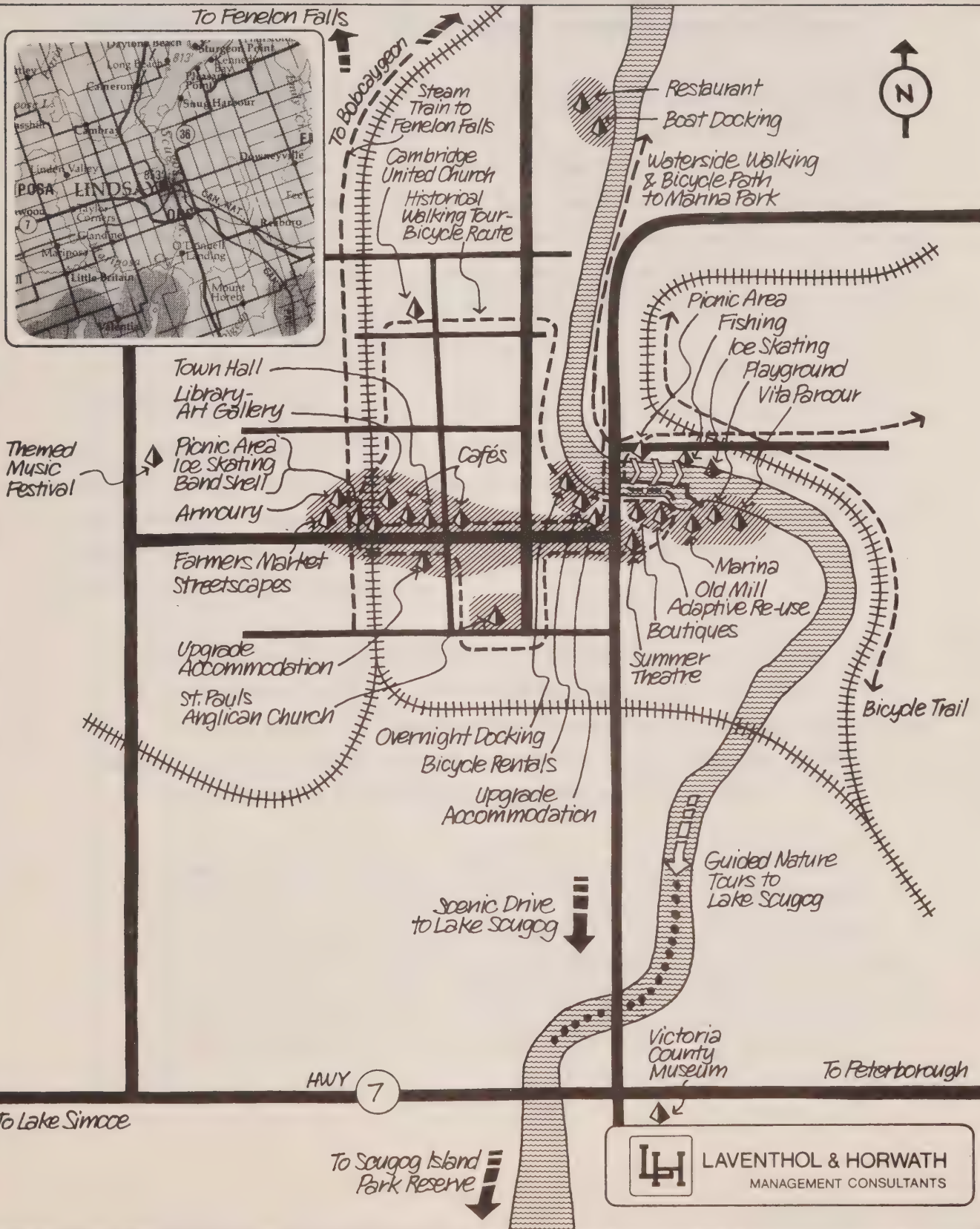
OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Upgrade Accommodation	<ul style="list-style-type: none"> - improve and extend overnight stay potential - improve services to tourists 	<ul style="list-style-type: none"> - regional - provincial - national - U.S. 	<ul style="list-style-type: none"> - tour groups (steam train) - theatre guests - transient auto traffic 	- year round	- medium	<ul style="list-style-type: none"> - planning - development - funding - operation - promotion 	<ul style="list-style-type: none"> - technical assistance - funding - promotion 	- good	<ul style="list-style-type: none"> - refurbish old hotel - include meeting/conference facilities - exterior to reflect streetscape theme
Old Mill Restaurant and Hotel	<ul style="list-style-type: none"> - improve services to tourists - improve quality and diversity of food and beverage and accommodation facilities - preserve heritage building - improve and extend overnight stay potential - serve new market created by boat and steam train tours 	<ul style="list-style-type: none"> - local - regional - provincial - national - U.S. 	<ul style="list-style-type: none"> - theatre guests - transient and overnight boater traffic - tour groups (boat and steam train) - cottagers - upscale market 	- year round	- low	<ul style="list-style-type: none"> - planning - development - funding - operation - promotion 	<ul style="list-style-type: none"> - technical assistance - funding - promotion 	- very good	<ul style="list-style-type: none"> - development reflect heritage of waterway - brewers retail should be re-located - combined with marina and park as focal point of Lindsay
Marina	<ul style="list-style-type: none"> - improve services to tourists - improve and extend day-use and overnight stay potential - encourage penetration of area 	<ul style="list-style-type: none"> - local - regional - provincial - national - U.S. 	<ul style="list-style-type: none"> - transient and overnight boaters - fishermen 	<ul style="list-style-type: none"> - spring - summer - fall 	- low	- promotion	<ul style="list-style-type: none"> - planning - development - funding - operation - promotion 	- very good	- complement old mill restaurant/accommodation and municipal park
Riverside Boardwalk	- linkage with other area attractions	<ul style="list-style-type: none"> - local - regional - provincial - national - U.S. 	<ul style="list-style-type: none"> - transient auto traffic - transient and overnight boaters - hotel guests - park users 	- year round	- low	- promotion	<ul style="list-style-type: none"> - planning - development - funding - operation - promotion 	- very good	<ul style="list-style-type: none"> - link overnight docking, boutiques, locks, hotel, restaurant, marina, creative play area and vita parcour - landscape peripheral areas
Wilson Municipal Recreation Park	<ul style="list-style-type: none"> - improve services to tourists - improve and extend day-use potential - enhance scenic quality of waterway 	<ul style="list-style-type: none"> - local - regional - provincial - national - U.S. 	<ul style="list-style-type: none"> - transient and overnight boater traffic - school groups - transient auto traffic - central business district pedestrian traffic 	- year round	- low	- promotion	<ul style="list-style-type: none"> - planning - development - funding - operation - promotion 	- very good	<ul style="list-style-type: none"> - include creative play area, ice skating during winter, vita parcour, rest rooms, change house - landscaped - re-locate trucking firm

TABLE 4.10
DEVELOPMENT OPPORTUNITIES
LINDSAY
(continued)

OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Themed Music Festival	<ul style="list-style-type: none"> - increase range of attractions - improve and extend day-use and overnight stay potential - increase season length 	<ul style="list-style-type: none"> - local - regional - provincial - national 	<ul style="list-style-type: none"> - transient auto traffic - tour groups - school groups - theatre guests - cottagers 	- fall	- low	<ul style="list-style-type: none"> - planning - development - funding - operation - promotion 	<ul style="list-style-type: none"> - planning - promotion 	- good	<ul style="list-style-type: none"> - at exhibition grounds - different type of music each day, e.g. jazz
Heritage Festival Week/Day	<ul style="list-style-type: none"> - increase range of attractions - improve and extend day-use and overnight stay potential - increase season length - reinforce heritage and waterway themes of area 	<ul style="list-style-type: none"> - local - regional - provincial - national 	<ul style="list-style-type: none"> - historical enthusiasts - transient auto traffic - tour groups - school groups - cottagers 	- spring	- low	<ul style="list-style-type: none"> - development - funding - operation - promotion 	<ul style="list-style-type: none"> - planning - development - funding - promotion 	- good	<ul style="list-style-type: none"> - possible tie-in with Victoria County Spring Festival of the Arts - use of theatre for period plays

LINDSAY Day use/Overnight

4.8



LAVENTHOL & HORWATH
MANAGEMENT CONSULTANTS

BURLEIGH FALLS AREA DEVELOPMENT STRATEGY

DEVELOPMENT ORIENTATION - DAY-USE, OVERNIGHT

DEVELOPMENT THEME - WATER-ORIENTED OUTDOOR RECREATION/FISHING

The village of Burleigh Falls is located between Stony and Lovesick Lakes at the intersection of Highways 28 and 36. The landscape of the surrounding area is undulating, forested and marked with numerous rock outcrops. The north shore of Stony Lake immediately east of Burleigh Falls has long been recognized for its natural scenic beauty. It was one of the first resort areas to be developed in Ontario and the natural resources of the area provide an excellent setting for water-oriented recreational activities.

Activities which create the greatest attraction for visitors to the area are include canoeing, fishing, boating, hiking and snowmobiling. Visitors and local residents also participate to a limited degree in cross-country skiing. The extensive cottage development in Burleigh and Harvey Townships (over 3,100 cottages) provides the area with a large potential overnight population.

Land and water based outdoor recreation in a scenic natural environment is the predominant theme for tourism development in the Burleigh Falls area. Unlike a number of the other small urban nodes in the Trent-Severn Waterway, this area does not have a rich historical past but rather, gains its recognition as a prime camping and cottaging area.

The development intent for this area is to expand and upgrade the existing facilities, attractions and services, and to create new ones consistent with the water-oriented recreation theme. New attractions should be integrated with existing complementary developments, such that the area package will generate a volume of tourist traffic of sufficient size to support expansion of the accommodation and food and beverage sectors.

The strategy for the area is to increase day-use and overnight stay potential, particularly during the summer and shoulder seasons. Additionally, it is to encourage the use of the Burleigh Falls area as a launching point for further penetration of the surrounding zone. The Burleigh Falls district is not considered a high opportunity area for increased winter tourism activity. The rationale for this strategy is based on the cross-roads location of the area with respect to the auto and boater corridors. Highway 28 is part of the heritage and scenic route which traverses the Kawartha Lakes and it is the major north-south access route linking the cottage development and tourist facilities around Jack, Chandos, Eels and Paudash Lakes with the population centres of the south. The Lovesick and Burleigh Falls locks are important nodes on the Trent-Severn Waterway - the major east-west water-oriented corridor in the study zone.

The key geographic market for tourism in this zone is the Ontario resident, particularly from Metropolitan Toronto. Other Canadians, Americans and overseas visitors are also attracted to the area because of the boating and fishing opportunities within this scenic natural environment. It is expected that U.S. residents will be the most important of the secondary markets. Tourism development opportunities should centre on meeting the needs of boaters, fishermen, canoeists, campers, hikers and naturalists.

Development Opportunities

The proposed development opportunities are detailed in Table 4.11, and presented conceptually in Exhibit 4.9. Development opportunities are designed primarily to retain the visitor in the immediate Burleigh Falls area for longer day-use visits, encourage overnight stops and retain for a longer period those already committed to an overnight stay. To encourage more day-use, a picnic park should be located proximate to Highway 28 overlooking the falls. Transient auto traffic and hikers not wishing to view the boating activity at the locks could stop here. Another picnic area should be located close to the locks but away from

parking area to cater to boaters and non-boaters interested in viewing the boating activities. An interpretive plaque should be located here outlining the legend of Lovesick Lake.

Expanded boat docking both above and below the Burleigh Falls locks should be developed for boaters, cottagers and fishermen. Tour boats with scheduled luncheon stops in Burleigh Falls will also require this additional space.

A boat launch, as well as expanded and upgraded marina facilities, is required to provide the needed additional service while encouraging greater use of the area as a Trent-Severn embarkation and disembarkation point. An outfitting centre providing fishing equipment, canoes, sailboats and sailing equipment could also increase the quality of boating opportunities on Lovesick Lake.

New canoe routes complementing those on Eels Creek, Indian River and the Mississauga River could also draw more tourists into the Burleigh Falls area. Additional canoeing potential exists for routes through Stony Lake to Eels Creek, across to Anstruther Lake, down the Mississauga River to Buckhorn and back to Burleigh Falls.

The wind and water conditions below the locks are suited to the development of a windsurfing and canoe rental centre. While canoes will provide the vehicle for further penetration of the area, windsurfing will encourage more use of the immediate area.

Rock outcrops in the channel downstream from the Burleigh Falls dam afford the opportunity for whitewater kayaking. These rapids, while not of sufficient size to attract an international or national market, could appeal to provincial, regional and local whitewater enthusiasts.

To provide links between the whitewater activity area, roadside picnic park, fish viewing, boat launching and rental areas and the locks a walking trail should be developed. This same trail could link the

immediate Burleigh Falls area with the activity centre below the locks. A hiking trail joining Petroglyphs Provincial Park and Eels Creek with its three waterfalls (including High Falls) to Burleigh Falls will further emphasize this area as a cross-roads. It will also encourage its increased utilization as a day-use and overnight stay area. The Viamede Hotel and the Mt. Julian Hotel on the north shore of Stony Lake should provide the hiker with a glimpse of the past. Both hotels built in the early 1860's were later converted in the 1870's from their role of accommodating lumbermen to that of accommodating tourists.

The shoreline of Stony Lake, near the Burleigh Falls locks, is an ideal location for a campground development catering to both auto and boater traffic. While the campground would operate primarily as a full-service resort facility providing approximately 180 sites, a sufficient number of sites should remain to provide overnight stop opportunities for transient auto and boater traffic. This development must remain in harmony with the theme of preserving the natural environment of the area.

TABLE 4.11
DEVELOPMENT OPPORTUNITIES
BURLEIGH FALLS AREA

OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Expand and Upgrade Food and Beverage	- serve increased market generated by new and current tourism development - enhance overnight stay appeal of area	- local - regional - provincial - national - U.S.	- transient auto traffic - transient boater traffic - tour groups (bus and boat) - fishermen - transient and seasonal campers - cottagers	- year round	- low	- funding - development - operation - promotion	- technical assistance - promotion	- good	- access for both transient auto and boater traffic will be important
Whitewater Boating	- increase range of attractions - extend day-use and overnight stay appeal of area	- local - regional - provincial - national - U.S.	- transient auto traffic - kayaking enthusiasts - transient and seasonal campers - cottagers	- spring - summer	- low	- funding - development - operation - promotion	- promotion	- good	- would provide opportunity for short duration instruction - rental of kayak, rubber craft, etc. - would depend on suitable water depth
Picnic Park	- provide needed service for tourists - extend day-use appeal	- regional - provincial - national - U.S.	- transient auto traffic - hikers - cottagers	- summer - fall	- medium		- planning - funding - development - operation - promotion	- good	- complement boater oriented picnic area
Expand and Upgrade Marina Facilities	- provide needed service for existing and expanding tourist market - encourage penetration into area	- local - regional - provincial - national - U.S. - international	- fishermen - transient boater traffic - cottagers - transient and seasonal campers	- summer	- medium	- funding - development - operation - promotion	- technical assistance - promotion	- very good	- orient toward seasonal campers and transient boater traffic - existing facilities
Nature/Walking Trail	- increase range of attractions - extend day-use and overnight stay appeal of area - linkage with other area attractions - consistent with accessible scenic waterway theme	- local - regional - provincial - national - U.S.	- transient boater traffic - transient auto traffic - cottagers - transient and seasonal campers - hikers - naturalists	- summer - fall	- low		- planning - funding - development - operation - promotion	- very good	- complement development of other facilities near Lock 28 (i.e. picnic area, whitewater boating, camping) - link with other day-use facilities/attractions

TABLE 4.11
DEVELOPMENT OPPORTUNITIES
BURLINGHAM FALLS AREA
(continued)

OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Hiking Trail	- encourage penetration of area - improve and extend overnight stay potential - increase range of attractions	- local - regional - provincial	- hikers - naturalists - cottagers - transient and seasonal campers - overnight boaters	- summer - fall	- low		- planning - funding - development - operation - promotion	- very good	- could serve as cross-country ski trail in winter - link with Petroglyphs Provincial Park
Boat Launch	- improve and extend day-use and overnight stay - encourage penetration of area - consistent with accessible scenic waterway theme	- local - regional - provincial	- transient and seasonal campers - day-use boaters	- summer	- medium		- planning - funding - development - operation - promotion	- good	- linkage with fishing opportunities on Lovesick and Stony Lakes and near dam - provide day trip water access to Buckhorn Wildlife Festival, Whetung Craft Centre
Outfitter/ Fishing Equipment/ Canoe and Sailboat Rental	- improve and extend day-use and overnight stay potential - increase range of attractions - increase services for tourists - encourage penetration of area - consistent with accessible scenic waterway theme	- local - regional - provincial - national - U.S. - international	- fishermen - cottagers - transient and seasonal campers - canoeists - sailors	- summer	- low	- funding - development - operation - promotion	- technical assistance - promotion	- very good	- could tie in with Parks Canada property on operator lease basis
Canoe Routes	- encourage penetration of area - increase range of attractions - improve and extend overnight stay potential	- regional - provincial - national - U.S. - international	- canoeists - naturalists - seasonal campers - cottagers	- spring - summer - fall	- low	- promotion	- planning - funding - development - promotion	- good	- increase use of Eels Creek, Indian River and Mississauga River canoe routes - complement outfitter and canoe rentals
Expand Docking	- provide linkage with other area centres on boat tours - consistent with accessible scenic waterway theme - improve and extend day-use potential	- provincial - national - U.S. - international	- tour groups (boaters) - transient boater traffic - sailors	- summer	- low	- funding - development - operation - promotion	- planning - funding - development - operation - promotion - technical assistance - liaison	- very good	- increase use of food and beverage outlets - boat tour stop

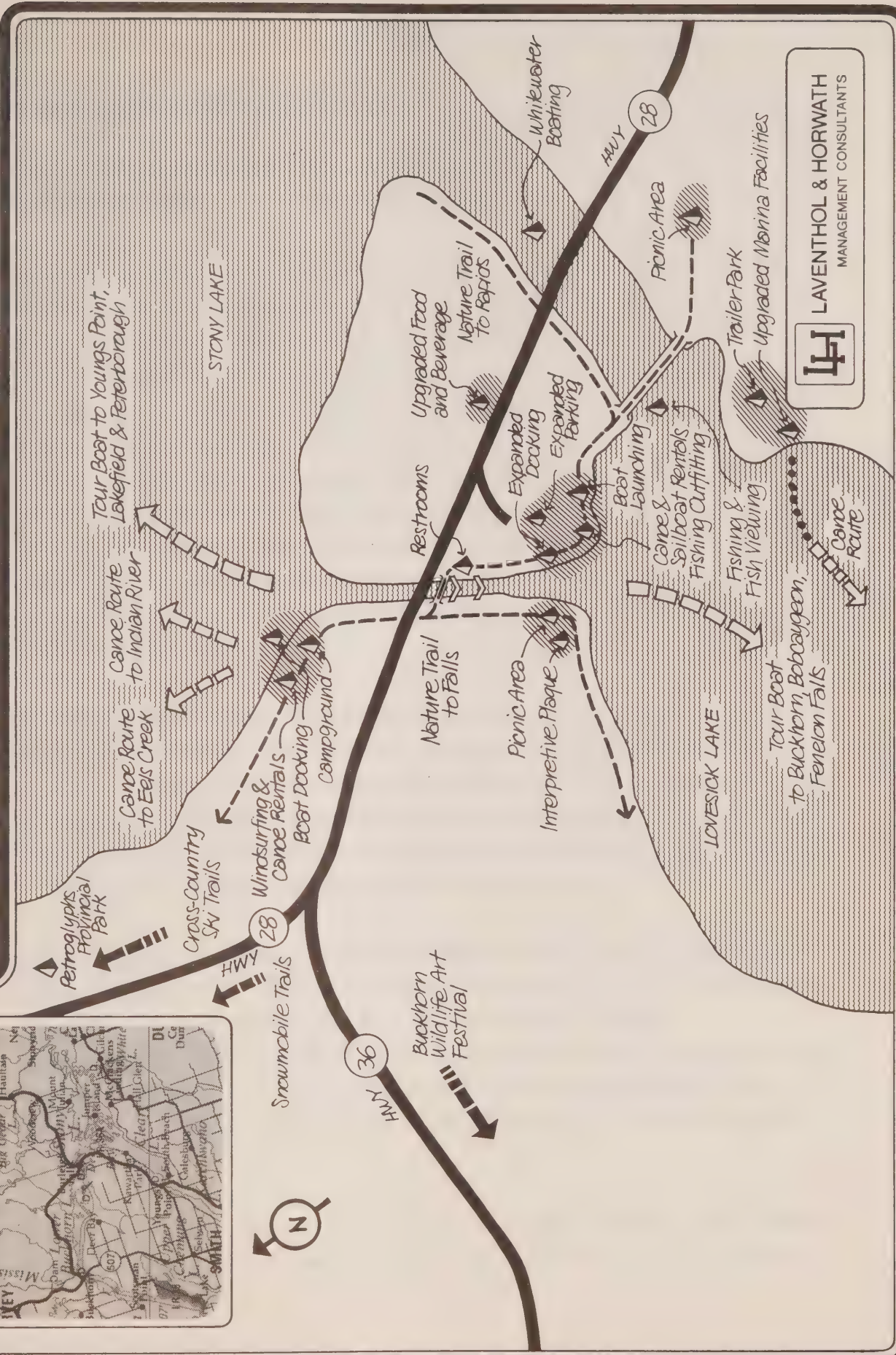
TABLE 4.11
DEVELOPMENT OPPORTUNITIES
BURLEIGH FALLS AREA
(continued)

<u>OPPORTUNITY</u>	<u>STRATEGY RELATIONSHIP</u>	<u>GEOGRAPHIC MARKET</u>	<u>SPECIALTY MARKET</u>	<u>SEASON</u>	<u>REGIONAL COMPETITION</u>	<u>ROLE OF PRIVATE SECTOR</u>	<u>ROLE OF GOVERNMENT</u>	<u>DEVELOPMENT POTENTIAL</u>	<u>FURTHER COMMENTS</u>
Campground	- improve and extend overnight stay potential - provide increased service/facility for tourism - increase range of available accommodation in area	- regional - provincial - national - U.S. - international	- transient and seasonal campers - transient boater traffic - transient auto traffic - hikera	- summer	- low	- funding - development - operation - promotion	- planning - technical assistance - promotion	- very good	- upscale rustic campground - cater to boaters and auto traffic - largely operate as seasonal campground - ideally situated on Stony Lake - include boat docking and boat launching facilities
Sailboarding and Canoe Rental Concession	- improve and extend day-use and overnight stay potential - increase range of attractions - promote and increase use of local facilities	- local - regional - provincial - national - U.S.	- transient and seasonal campers - transient auto traffic - canoe and sail-boarding enthusiasts - cottagers	- summer	- low	- funding - development - operation - promotion	- technical assistance - promotion	- very good	- could be linked with campground development - canoe trips to Buckhorn Wildlife Festival, Whetung Craft Centre
Picnic Park	- provide needed service for tourists - extend day-use appeal	- regional - provincial - national - U.S.	- transient and overnight boaters - hikera	- summer	- medium		- planning - funding - development - operation - promotion	- good	- complement auto-orientated picnic area

BURLEIGH FALLS AREA

Day use/Overnight

4.9



LH LAVENTHOL & HORWATH
MANAGEMENT CONSULTANTS

BANCROFT AREA DEVELOPMENT STRATEGY

DEVELOPMENT ORIENTATION - DAY-USE/OVERNIGHT

DEVELOPMENT THEME - MINING/LUMBERING

Bancroft is situated in the northern part of Hastings County, at the intersection of Highways 28 and 62. The landscape is characterized by rocky, forested terrain and numerous lakes and rivers. The area is world-renowned for mineral collecting. In addition, the Bancroft region is popular for year-round fishing, and for snowmobiling and cross-country skiing in winter. Thus, the existing tourist market for the area can be subdivided into two broad groups: mineral collectors and outdoor recreation enthusiasts. Rockhounds travel to Bancroft from all over Canada, the United States and several overseas nations because of the unique variety and quantity of minerals present in the area. Those interested in outdoor activities originate primarily in Ontario and the northern United States.

The development strategy for Bancroft aims at increasing day-use and overnight visitation from these two groups on a year-round basis. The intent of the proposed development opportunities is to enhance the range of attractions and services available in the community. The new facilities will complement the existing infrastructure, while maintaining a "conserver" approach to the natural resource base.

The accessible wilderness is the predominant theme for Bancroft area tourism development. Mining and lumbering constitute the key heritage sub-themes to be incorporated into the development scheme. Bancroft began as a lumbering town. Its site was chosen because of its strategic location on the York River and at the intersection of two colonization roads. Lumbering is still important to the community's economy today.

Small-scale mining of a variety of mineral products began in the 1880's. Remains of these early operations are scattered throughout the region.

With the exception of the Madawaska Uranium Mines, a major local employer, there are no active mining operations in the Bancroft area today.

Development Opportunities

The proposed development opportunities are detailed in Table 4.12 and presented conceptually in Exhibit 4.10. Several of the suggestions are aimed at attracting mineral collecting enthusiasts in greater numbers, especially at times other than the annual Gemboree festival. A mineral park should be created which will allow visitors to observe and participate in mineral collecting. A boat tour could convey people to and from the suggested park site on the York River. A rockhound guide service and a mineral display centre are two other attractions which would enhance the tourist experience in Bancroft.

New snowmobile trails and canoe routes proposed for the area should be completed in order to draw participants in these activities to Bancroft. There is a need for cross-country ski trails proximate to the community which could be developed in conjunction with a ski centre to serve trail users. Hut-to-hut skiing should be developed between the Apsley and Silent Lake trail networks to create an opportunity for a ski marathon of greater distance and variety than the existing Kawartha Ski Tour. Day trips via mini-bus could be developed to take advantage of area attractions such as river rafting on the Madawaska River, downhill skiing at Mt. Madawaska and tours of the Harcourt Lumber Mill and the Madawaska Mine.

Improved tourist services such as a year-round (rather than summer only) information centre and an interpretive centre are needed in Bancroft. The appearance of the community should be upgraded by developing a themed streetscape for the main street and by creating a scenic river walk along the York River. The river walk also presents an opportunity to present the area's lumbering heritage. At present, commercial development has turned its back to the river. These businesses, which serve tourists,

should re-orient themselves toward the water. A cafe and an arts and crafts market are two such operations which could take advantage of a riverside location. An annual lumberjack festival could also make use of this resource.

TABLE 4.12
DEVELOPMENT OPPORTUNITIES
BANCROFT AREA

OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Mineral Park	- increase range of attractions - capitalize on popularity of mineral collecting - interpretive opportunity - improves overnight stay potential	- provincial - national - U.S. - international	- mineral collectors - tour groups - school groups	- spring - summer - fall	- low	- promotion	- technical assistance - planning - development - promotion - operation - funding	- very good	- suitable site on York River - high priority
Boat Tour to Mineral Park	- to provide access to Mineral Park	- provincial - national - U.S. - international	- mineral collectors - tour groups - school groups	- spring - summer - fall	- low	- funding - development - operation - promotion	- promotion	- good	- from town to mineral park
Mineral Display Centre	- increase range of attractions - interpretive opportunity and introduction to mineral park - improves day-use appeal	- provincial - national - U.S. - international	- mineral collectors - tour groups - school groups	- year round	- low	- development - operation - promotion	- planning - technical assistance - funding - promotion	- very good	- ideal location is near tourist information centre - high priority
Mineral Guiding Centre	- increase services available to mineral collectors - improves overnight stay potential	- provincial - national - U.S.	- mineral collectors	- spring - summer - fall	- low	- funding - development - operation	- promotion	- good	- to conduct guided hikes to mineral collecting sites - could rent mineral collection
Cross-Country Ski Trails	- increase facilities for outdoor recreationists - improve overnight stay potential	- local - regional - provincial	- cross-country skiers	- winter	- medium	- funding - development - operation - promotion	- planning - promotion	- very good	- link Silent Lake trails with Apsley trails - develop trails nearer to Bancroft - high priority
Hut to Hut Skiing	- increase range of attractions - improve overnight stay potential	- provincial - national - international	- cross-country skiers - school groups - tour groups	- winter	- medium	- funding - development - operation - promotion	- planning - promotion	- fair	- could be developed on Silent Lake to Apsley trail network
Canoe Routes	- increase facilities for outdoor recreationists - improve overnight stay potential	- provincial - U.S. - international	- canoeists - school groups - tour groups	- spring - summer - fall	- medium	- promotion	- funding - development - promotion	- very good	- develop proposed canoe route on York River, Crow River and Kitta Creek - high priority

TABLE 4.12
DEVELOPMENT OPPORTUNITIES
BANCROFT AREA
(continued)

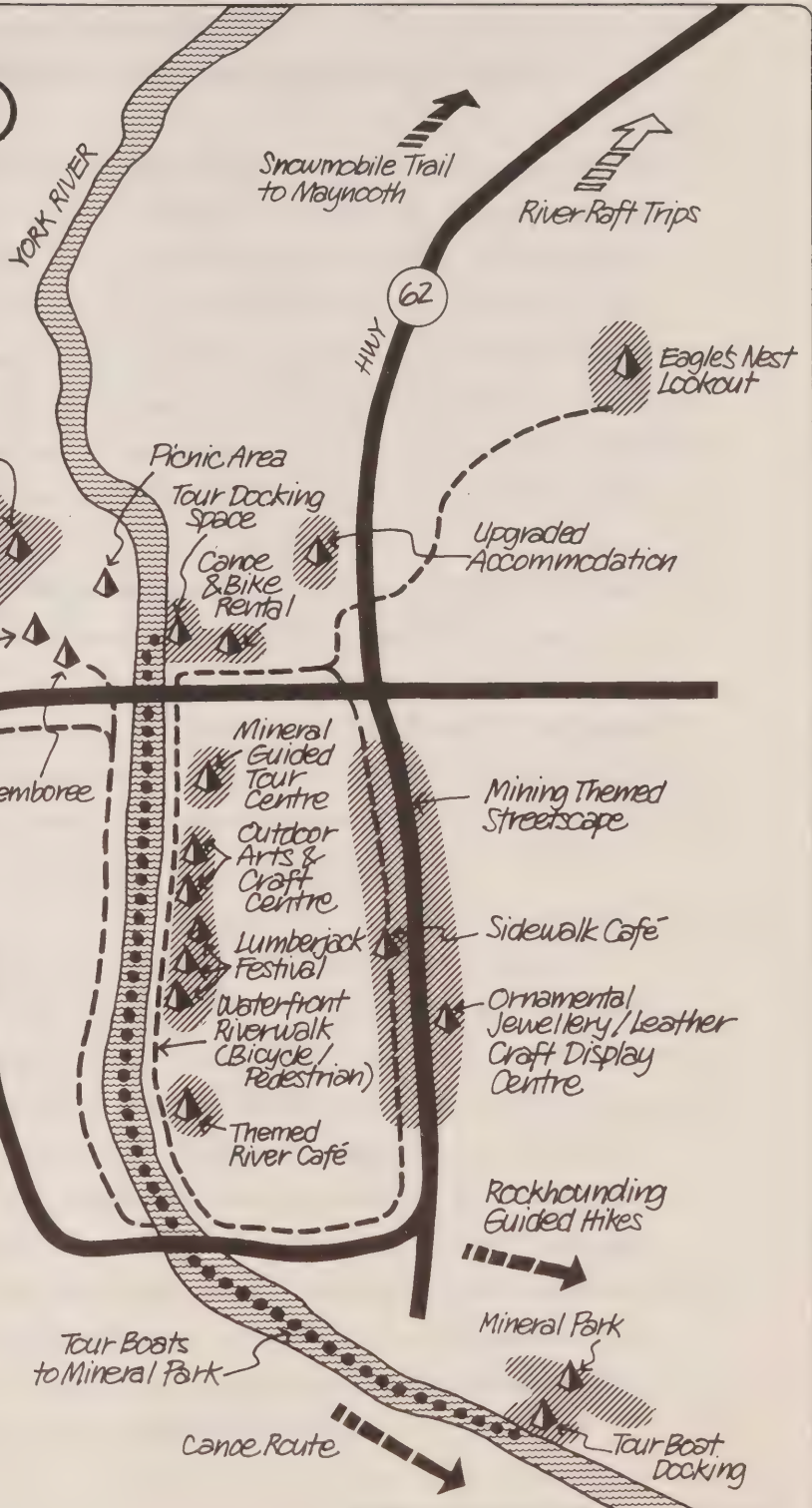
OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALITY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Canoe and Bicycle Rental Centre	- improve services to visitors - improve day-use and overnight stay potential	- provincial - U.S. - international	- canoeists - cyclists	- spring - summer - fall	- medium	- planning - funding - development - operation - promotion	- promotion	- good	
Amphi-theatre/ Interpretive	- improve day-use potential - increase range of attractions	- provincial - national - U.S.	- mineral collectors - school groups	- spring - summer - fall	- low	- promotion - funding - development - promotion - operation	- planning - funding - development - promotion - operation	- good	- present mineral information, heritage themes and introduce natural environment
Themed Streetscape	- improve day-use potential - opportunity to present mining heritage theme	- local - regional - provincial - national - U.S. - international	- tour groups	- year round	- low	- planning - funding - development	- planning - technical assistance - funding	- good	- joint venture by merchants and local governments
River Cafe	- increase services available to visitors - improve day-use potential	- local - regional - provincial - national - U.S. - international		- year round	- medium	- planning - funding - development - operation - promotion	- promotion - funding	- good	- should be oriented toward water
Outdoor Arts and Crafts Market	- improve day-use potential - increase range of attractions	- local - regional - provincial - national - U.S. - international	- collectors - tour groups	- summer	- low	- planning - funding - development - operation - promotion	- promotion	- very good	- ideal locations on waterfront - should feature local artisans' work - could be combined with display centre.
Jewellery and Leathercraft Display Centre	- increase range of attractions - improve day-use potential	- local - regional - provincial - national - U.S. - international	- collectors - tour groups	- year round	- low	- planning - funding - development - operation - promotion	- promotion	- very good	- feature work of local crafts-men - could be combined with arts and crafts market.

TABLE 4.12
DEVELOPMENT OPPORTUNITIES
BANCROFT AREA
(continued)

<u>OPPORTUNITY</u>	<u>STRATEGY RELATIONSHIP</u>	<u>GEOGRAPHIC MARKET</u>	<u>SPECIALTY MARKET</u>	<u>SEASON</u>	<u>REGIONAL COMPETITION</u>	<u>ROLE OF PRIVATE SECTOR</u>	<u>ROLE OF GOVERNMENT</u>	<u>DEVELOPMENT POTENTIAL</u>	<u>FURTHER COMMENTS</u>
Madawaska Mine Tour	- increase range of attractions - improve day-use potential - opportunity to present mining theme	- provincial - national - U.S. - international	- school groups - tour groups	- year round	- low	- development - operation - promotion	- promotion	- good	- requires cooperation of mine management
Harcourt Lumber Mill Tour	- increase range of attractions - improve day-use potential - opportunity to present lumbering theme	- provincial - U.S.	- school groups - tour groups	- year round	- low	- planning - development - operation - promotion	- promotion	- good	- require cooperation of mill management
Lumberjack Festival	- increase range of attractions - improve day-use and overnight stay potential - opportunities to present lumbering theme	- local - regional - provincial	- tour groups	- spring	- low	- planning - funding - promotion	- planning - promotion - development - operation - funding	- very good	- log rolling events, lumberjack skills contests, pancake breakfasts

BANCROFT AREA Day use/Overnight

4.10



LAVENTHOL & HORWATH
MANAGEMENT CONSULTANTS

BOBCAYGEON AREA DEVELOPMENT STRATEGY

DEVELOPMENT ORIENTATION - DAY-USE/OVERNIGHT

DEVELOPMENT THEME - LUMBERING/CANAL CONSTRUCTION/FISHING

Bobcaygeon, located between Pigeon and Sturgeon Lakes and accessed via Highway 36, is a picturesque town situated on a series of islands and adjacent mainland. The visual appeal of the area, combined with its strategic location at the mid-point of the Trent-Severn corridor makes Bobcaygeon an ideal development node. The town is steeped in history and has been able to preserve a large proportion of its heritage buildings. The community is utilized by seasonal boaters on a large scale. Vacation homes in the area are among the more attractive within the study zone.

The development strategy for Bobcaygeon is to encourage both day-use and overnight visitation on a year-round basis. The area is centrally located in terms of access from major urban centres and via the waterway. The aesthetic appeal of the area and its historic and natural resources are the prime tourism generators. The primary target is the Ontario resident, especially from the Metropolitan Toronto area and, to a lesser extent, Americans and European tour groups.

Bobcaygeon began as a sawmilling community and became the base of operations for Mossom Boyd, one of Ontario's foremost lumber barons. Logs from the Shield hinterland to the north were floated to Bobcaygeon and processed into sawn lumber for southern markets. When the Bobcaygeon Colonization Road was built, the town acted as a gateway to the north. In the nineteenth century, the community was also known for its lime kilns. Use of local limestone is evident in the town's many heritage buildings. The first lock on the Trent-Severn Waterway was constructed at Bobcaygeon. All buildings older than 100 years are signposted and include Boyd House, the Boyd Lumber Co. offices, the Anglican Church, a school house, a fire station and a commercial block.

The development intent is to capitalize on the existing historical base and to develop complementary attractions and facilities throughout the town. Of key importance is the provision of quality accommodation in order to extend the tourist stay from day-use to overnight. This, in turn, will increase usage of the proposed and existing recreation facilities.

Development Opportunities

The many century homes interspersed throughout Bobcaygeon provide an excellent opportunity to develop a self-interpretive walking tour originating from the tourist information centre. The centre itself is to be relocated to improve access and parking. Included along the walking tour would be a stop-off at the Boyd House, which is presently privately owned and should be acquired through government funding for the purpose of developing a museum. A themed streetscape based on the lumbering area is proposed for the main street of Bobcaygeon. The walking tour continues to the northern side of Bobcaygeon and should pass over the dam and the old dry docks. Interpretive signage should be provided for the dry docks and the waterway improvements. The return leg of the walking tour would view the many century homes on this side of town and provide shopping opportunities at the proposed boutiques on Main Street.

To complement the heritage-oriented activities and attractions, a lumberjack festival, farmers market and winter carnival, all based at the fair grounds in Bobcaygeon are recommended. The winter carnival should include sleigh rides through the town to view the various historic attractions. Snowmobiling is a popular winter activity in the Bobcaygeon area and, therefore, a major snowmobile rally should be developed using nearby trails. This event could be the focal point of the winter carnival.

Proposed tour boat trips could pass through Bobcaygeon, patronizing the various existing and recommended recreation activities and attractions, as well as the food and beverage and accommodation facilities. The

additional boating traffic, generated by the proposed development in Bobcaygeon, could necessitate expanded docking facilities. Furthermore, the need for seasonal and transient docking in the form of an integrated marina complex is also required. This type of marina operation could be based either on Sturgeon Lake or closer to the town of Bobcaygeon. Some additional picnicking sites are recommended in the Bobcaygeon area.

The existing inventory of food and beverage establishments is limited and lacks any form of themed concept, a necessary ingredient in today's competitive foodservice market. The lack of evening entertainment in Bobcaygeon further reduces the potential for overnight usage. The upgrading and theming of the existing food and beverage operations is suggested. This should include a seasonally themed restaurant, focussed around snowmobiling in the winter and nautical events in the summer. A lumber-milling theme is recommended for one of the existing restaurants which should also be expanded to provide an entertainment facility.

The accommodation infrastructure in Bobcaygeon is generally outdated. The limited availability of quality accommodation in Bobcaygeon has placed the town at a disadvantage in competing for the overnight market. However, the location of most of the existing accommodation in Bobcaygeon is excellent. Consequently, the upgrading of existing accommodation is suggested. Furthermore, the provision of recreation amenities should be included (e.g. pools, tennis courts or recreation centres).

The physical plant of the Bobcaygeon Inn, which is closed, is in an extremely poor state of repair. However, the site occupied by the property is excellent for both auto and boat traffic. The demolition of the existing structure, with the exception of the original house, is suggested. Adaptive re-use of the site should include the provision of a year-round accommodation facility designed to attract a wider range of markets. To be viable as an accommodation establishment, demand must be generated from several market segments. The proposed Bobcaygeon Inn should be easily accessible to boaters for both overnight and day-use activities, while also providing the necessary amenities to attract the

bus tour, tourist and conference market. (In winter, packages for snowmobiles could be offered.) The development particulars for the Bobcaygeon Inn are as follows:

- A low-rise structure containing 20 to 30 guest rooms;
- A motel-type wing containing approximately 10 to 15 units;
- A 90-seat dining room;
- A 50-seat bar with outside terrace seating 30 (inside bar to be a greenhouse/atrium style);
- Three conference rooms seating 20 to 30 persons each, all interconnecting;
- Two hospitality rooms seating approximately 15 to 20 persons each;
- Docking and parking facilities.

Recreation amenities such as tennis courts, pool and sauna should be included but require the acquisition of additional land.

The surrounding area presents opportunities for day-trips to such attractions as Petroglyphs Provincial Park, the Whetung Native Craft Centre and a saw and planing mill. Accommodation packages could be offered for visitors attending the Buckhorn Wildlife Art Festival held each August.

A destination resort is recommended for Pigeon Lake. It should consist of a 50-room lodge and several deluxe housekeeping cottages. It should include a full complement of recreation facilities such as sailboats, tennis courts, indoor pool, windsurfers and cross-county ski trails. A shuttle service to Sir Sam's Ski area should be provided in the winter. Conference rooms are essential, particularly for shoulder season business. A houseboat rental outlet should be based at the resort. It is anticipated that such a destination facility will be able to capture some of the European tour market as it will be an attraction in itself capable of enhancing to a considerable extent the image of the Bobcaygeon area.

Bobcaygeon's location on the edge of the Shield and on the Trent-Severn Waterway results in a unique mix of intensive recreation facilities and access to extensive wilderness-oriented activities. Development opportunities for the node are designed to complement the existing tourism infrastructure, while capitalizing on the heritage and natural resources of the community and surrounding area. The resulting integrated tourism package will significantly increase the travel-generating potential of the Bobcaygeon development node. Details of the proposed development opportunities are outlined in Table 4.13 and presented conceptually in Exhibit 4.11.

TABLE 4.13
DEVELOPMENT OPPORTUNITIES
BOBCAYGEON AREA

OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Walking Tour of Century Homes	- capitalize on heritage resources of community - encourage day-use visitation	- local - regional - provincial - U.S. - international	- history buffs - tour groups - school groups - boaters	- year round	- low	- promotion - funding - promotion	- planning - development - funding - promotion	- very good	- requires self-guiding map, signposting - include Boyd House, historic dry dock, lock station and dam
Relocate Tourist Information Centre	- improve tourist services	- provincial - U.S. - international	- boaters - resort guests - transient day use visitors	- year round	- low	- funding - promotion	- planning - development - funding - operation - promotion	- good	- will improve accessibility and allow for increased parking
Boyd House Museum	- capitalize on heritage resources of community - opportunity to present lumbering and canal development heritage themes - increase range of attractions	- local - regional - provincial - U.S. - international	- tour groups - school groups - boaters - resort guests - cottagers	- year round	- low	- funding - development - operation - promotion	- technical assistance - funding - planning - promotion	- good	- requires acquisition of property which is presently in private hands
Streetscape	- improve tourist appeal of community - represent heritage themes	- local - regional - provincial - U.S. - international	- boaters - cottagers - resort guests - tour groups	- year round	- low	- planning - funding - development - promotion	- planning - development - funding - promotion	- very good	- themed upgrading of storefront and landscaping
Upgraded and Expanded Marina Facilities	- improve services to boaters - accommodate tour boats	- local - regional - provincial - U.S. - international	- boaters - tour groups	- spring - summer - fall	- medium	- planning - funding - development - operation	- planning - technical assistance - promotion	- very good	- should include a mix of seasonal and transient docking
Upgrade Accommodation	- attract overnight visitors - meet needs of boat tour market	- provincial - U.S. - international	- tour groups - boaters	- year round	- medium	- planning - funding - development - operation - promotion	- promotion - funding	- very good	

TABLE 4.13
DEVELOPMENT OPPORTUNITIES
BOBCAYGEON AREA
(continued)

OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Food & Beverage Facility	- improve tourist facilities - meet needs of boat tour market	- local - regional - provincial - U.S. - international	- boaters - tour groups - cottagers	- year round	- medium	- planning - funding - development - operation - promotion	- promotion - funding	- very good	- could be developed in conjunction with upgraded accommodation
Picnic Area	- improve tourist facilities	- regional - provincial - U.S. - international	- boaters - transient auto traffic	- summer	- medium	- promotion	- planning - funding - development - operation - promotion	- very good	- near the waterway
Farmers Market	- increase range of attractions	- local - regional - provincial - U.S.	- boaters - cottagers	- spring - summer - fall	- low	- planning - funding - development - operation - promotion	- promotion	- very good	- ideal location at fairgrounds
Lumberjack Festival	- increase range of attractions - increase day-use and overnight visitation	- local - regional - provincial		- spring	- medium	- planning - funding - development	- planning - funding - promotion	- good	
Snowmobile Rally	- increase drawing power of winter carnival - improve overnight visitation	- local - regional - provincial	- snowmobilers	- winter	- low	- planning - funding - development - operation - promotion	- planning - funding - promotion	- very good	- could be in conjunction with existing winter carnival
Canaraeka Hiking Trail	- increase range of recreational facilities - increase day-use and overnight visitation	- provincial - U.S. - international	- hikers	- spring - summer - fall	- low	- planning - funding - development - operation - promotion	- planning - funding - development - operation - promotion	- very good	- route is laid out but needs to be developed - portions could be used for cross-country skiing in winter

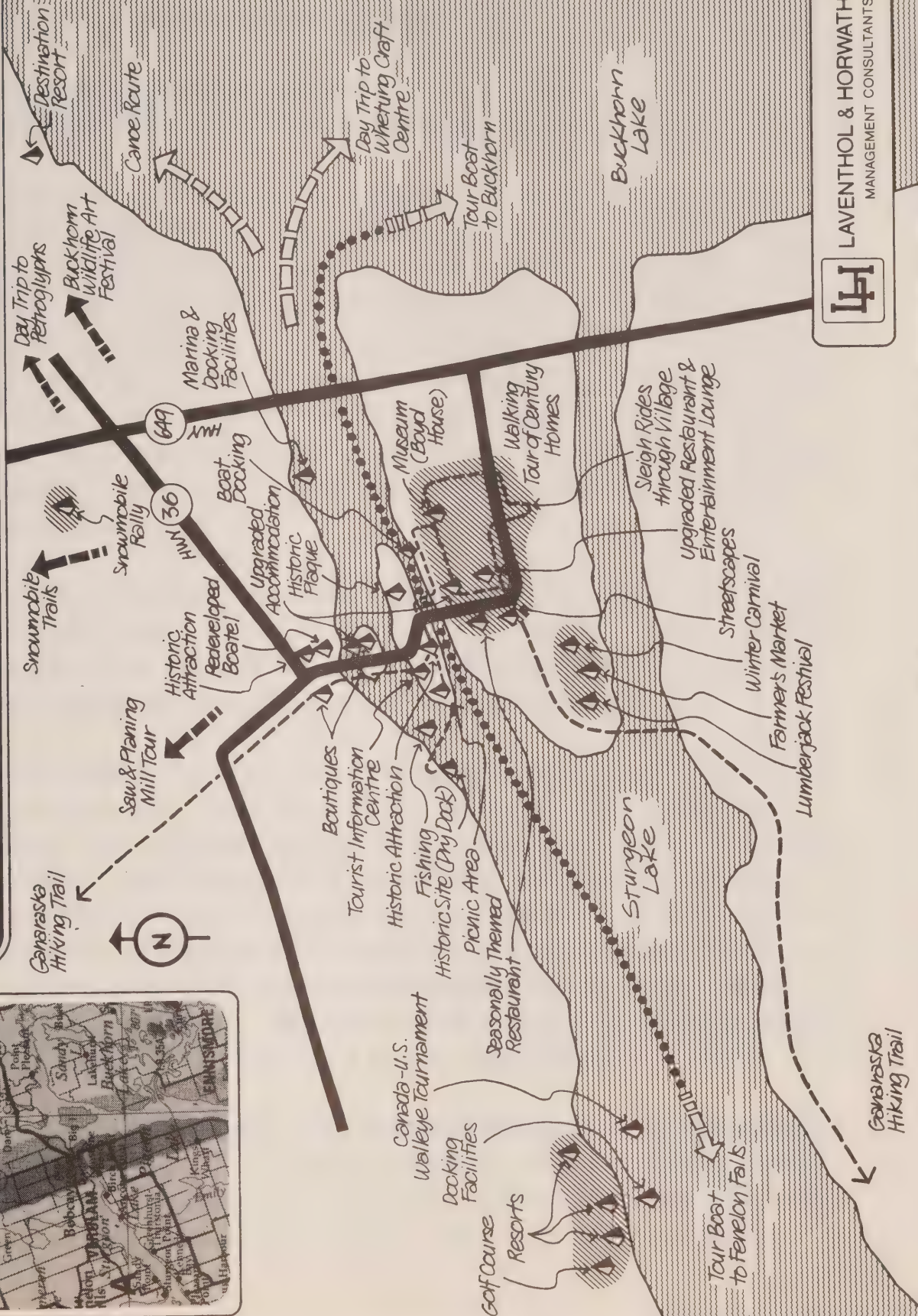
TABLE 4.13
DEVELOPMENT OPPORTUNITIES
BOBCAYGEON AREA
 (continued)

<u>OPPORTUNITY</u>	<u>STRATEGY RELATIONSHIP</u>	<u>GEOGRAPHIC MARKET</u>	<u>SPECIALTY MARKET</u>	<u>SEASON</u>	<u>REGIONAL COMPETITION</u>	<u>ROLE OF PRIVATE SECTOR</u>	<u>ROLE OF GOVERNMENT</u>	<u>DEVELOPMENT POTENTIAL</u>	<u>FURTHER COMMENTS</u>
Saw & Planing Mill Tour	- increase range of attractions - capitalize on lumbering heritage theme	- provincial	- tour groups - school groups	- year round	- low	- planning - funding - development - operation - promotion	- promotion	- good	- requires cooperation of mill operator
Destination Resort	- increase range of tourist facilities - improve image of area	- provincial - U.S. - international	- tour groups - families - conference- guests	- year round	- medium	- planning - funding - development - operation - promotion	- promotion - funding	- good	- should include wide range of recreational facilities and first-class services and amenities - high priorities

BOBCAYGEON AREA

Day use/Overnight

4.11



LAVENTHOL & HORWATH
MANAGEMENT CONSULTANTS

FENELON FALLS AREA DEVELOPMENT STRATEGY

DEVELOPMENT ORIENTATION - DAY-USE

DEVELOPMENT THEME - LUMBERING/MILLING/STEAM NAVIGATION

Fenelon Falls, a village of approximately 2,000, is situated at the juncture of Highway 121, 35A and the Fenelon River. It is said that Cameron and Sturgeon Lakes meet on its main street. The village has been closely connected to the development of the Trent Severn Waterway. It grew in early years as a milling and lumbering centre. Prior to 1867 when the first locks on the Trent-Severn Waterways were completed, it was the head of navigation for vessels plying the Kawartha Lakes. As the importance of lumbering declined, Fenelon Falls became known as a service centre for cottagers and recreational boaters, a reputation which it still retains today.

Tourists are currently attracted to Fenelon Falls because of the boating and fishing opportunities, in addition to the tourist services available. The majority of visitors are presently drawn from the local area, nearby urban centres in the region, as well as southern Ontario.

The development strategy for the Fenelon Falls area is to increase day-use visitation on a year-round basis. The intent of the proposed strategy is to increase the range of attractions and quality of services available in the community. The development opportunities complement the existing facilities and resources by conserving the natural resource base and preserving the community's historic attributes. Outdoor recreation related to a nationally significant waterway forms the major theme for the Fenelon Falls area. Sub-themes incorporating the lumbering, milling and steam navigation eras should also be represented.

Local, regional and provincial visitors should continue to provide the bulk of visitation to the Fenelon Falls area. The introduction of new attractions in addition to the upgrading and diversification of the food and beverage services could attract a growing share of Canadian and

American visitors. It is expected that the development of historically significant opportunities will have the greatest impact in attracting the Canadian market. Special attention should be focussed on attracting tour groups, school groups, boaters and historical enthusiasts.

Development Opportunities

Details of the identified development opportunities are outlined in Table 4.14 and presented conceptually in Exhibit 4.12. The development opportunities are aimed at broadening the appeal of Fenelon Falls as a day-use centre by providing a wider range of attractions. Quality food and beverage services in a themed facility should encourage a longer stay for all day-use visitors, including local cottagers and campers.

To emphasize the scenic natural resources of the area, a picnic park should be developed near the northern edge of the gorge providing an excellent view of the falls, the gorge itself and the boating activity below. A self-guiding nature walk should be developed in order to link the picnic park with the boat docking area, tour boat stop, the lock and the central business district. Stairs must be installed to reach the edge of the Fenelon River from the picnic park. The walk should continue past the boat docking area and tour boat stop to the locks where signage will indicate a walking tour of the historic buildings.

Self-interpretive signs should be erected depicting a brief history of each of the historic sites. The tour should include a number of the older stores on Oak and Colborne Streets as well as Maryboro Lodge, Blyth House and the Anglican Church. Other period buildings should be upgraded to present a streetscape emphasizing the lumbering and milling heritage of the community. A co-operative arts and crafts centre would further emphasize the town's heritage.

Expanded docking space should be provided below the lock in order that transient boaters are afforded the opportunity to stop and visit the Fenelon Falls area.

Fenelon Falls should be a stop on one of the Trent-Severn boat tours proposed for the study area. At least one of the boat tours will be aboard a replica of the "Empress", "Esturion", or "Goldeneye", all of which were steamers transporting tourists around the Kawartha Lakes from the late 1830's until the end of the century. Passengers would be in Fenelon Falls long enough for lunch, a historic walking tour, a view of the falls and an opportunity to shop before embarking for Lindsay. To accommodate those persons joining the tour in progress at Fenelon Falls as well as those visiting other attractions, it would be necessary to upgrade the available parking space near the boat docking area.

Improved tourist services such as a larger information and interpretive centre are needed in Fenelon Falls. A combined centre, located close to the locks, could present the early history of lock development as well as audio-visual presentations of other locks in the system and the role played by each community in the development of the Trent Severn Waterway. A cafe located near the locks could capitalize on boater activity in the area by providing quality meals. Expansion of the picnic park on Centre Island would encourage both transient auto and boater traffic to remain longer. With the information and interpretive centre located close by, tourists could be persuaded to remain within the area for longer periods of time. A restaurant located south of the Fenelon River should take advantage of the old foundation and forebay, which still remains intact, and develop a theme around the structure's role as a nineteenth century saw mill. An upgraded food and beverage establishment featuring entertainment would hold day visitors longer while drawing campers, cottagers and overnight boaters into the Fenelon Falls area.

To complement the boat tour stopping in Fenelon Falls, a steam train operating between Lindsay and Fenelon Falls would provide visitors with a scenic and exciting means of travelling between the two centres. The steam train stop in Fenelon Falls would allow passengers to disembark, view the locks and the falls, take a walk around the historic buildings or browse through the village. They would then return to Lindsay either by train or by tour boat.

TABLE 4.14
DEVELOPMENT OPPORTUNITIES
FENELON FALLS AREA

OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Viewpoint Picnic Park	- increase services available to tourists - improve day-use potential - promote scenic resource area	- local - regional - provincial - national - U.S.	- transient auto traffic - transient boater traffic - overnight boater traffic - photographers/sightseers - tour groups (boat and steam train)	- spring - summer - fall	- low		- planning - funding - development - operation - promotion	- good	- excellent viewpoint of falls and gorge
Nature Walk	- increase range of attractions - improve day-use potential - linkage with other attractions	- local - regional - provincial - national - U.S.	- transient auto traffic - transient boater traffic - naturalists	- spring - summer - fall	- low		- planning - funding - development - operation - promotion	- good	- require construction of wooden steps from river level to top of gorge - link picnic park and lock-oriented activities
Expand Boat Docking	- improve and extend day-use and overnight stay potential - increase facilities available to tourists	- regional - provincial - national - U.S.	- tour groups (boat and steam train) - transient boater traffic - overnight boater traffic	- summer - fall	- low	- funding - development - promotion - operation	- planning - funding - development - technical assistance - promotion	- good	- provide mooring for tour boats - alleviate current docking shortage
Upgrade Parking	- increase facilities available to tourists - improve and extend day-use potential	- local - regional - provincial - national - U.S.	- tour groups (boats) - cottagers - shoppers - historical enthusiasts	- year round	- medium	- funding - development - operation - promotion	- funding - planning - technical assistance - liaison - promotion	- good	- provide more efficient use of present parking area
Historic Walking Tour	- increase range of attractions - improve and extend day-use and overnight stay potential - opportunity to present lumbering theme	- regional - provincial - national	- tour groups (boat and steam train) - historical enthusiasts - transient auto traffic - transient boater traffic - school groups	- year round	- medium	- promotion	- funding - planning - development - promotion	- good	- self-interpretive signs depicting brief history of specific historical sites (e.g. Maryboro Lodge, Blyth House and Anglican Church)

TABLE 4.14
DEVELOPMENT OPPORTUNITIES
PENELON FALLS AREA
(continued)

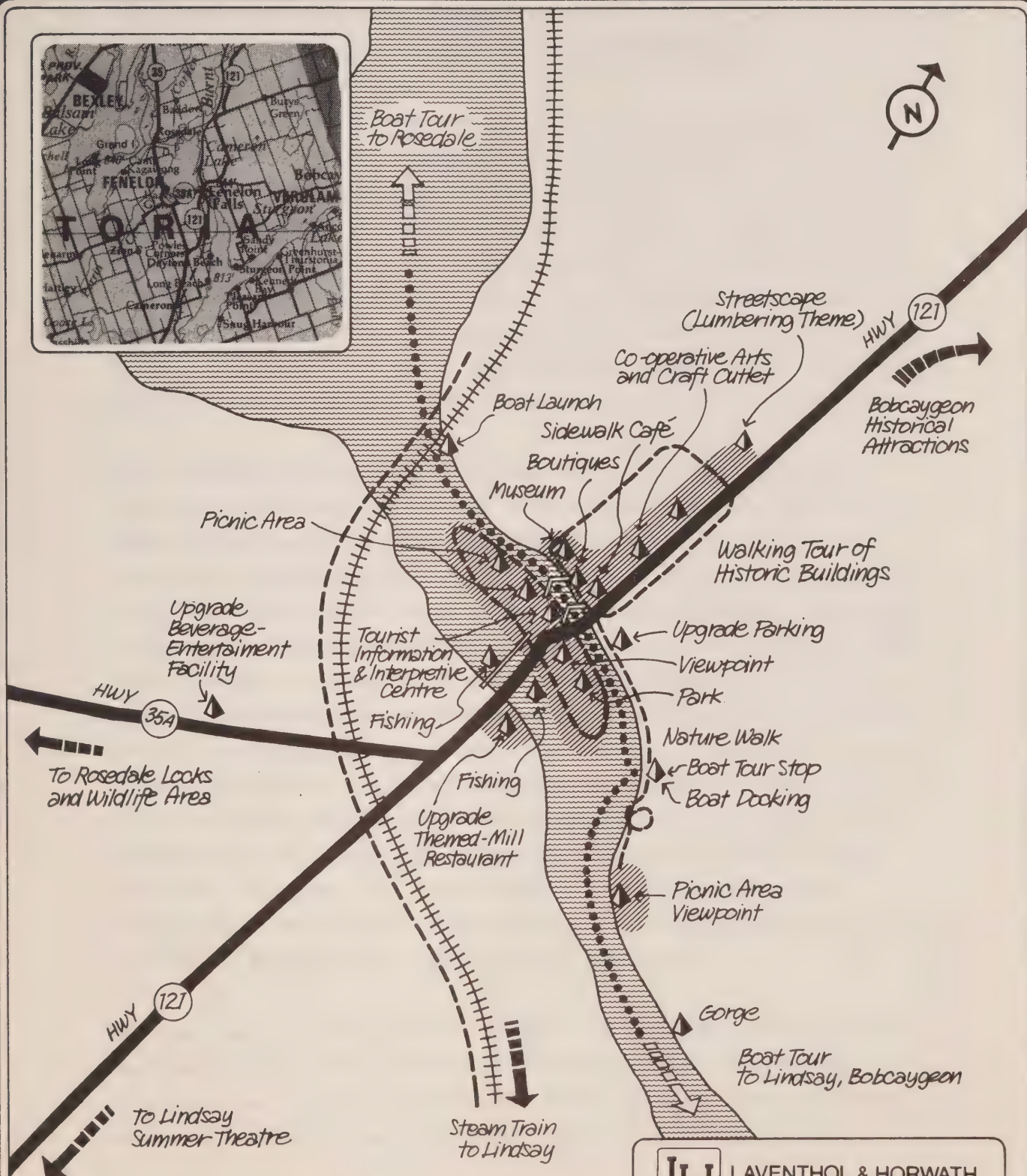
OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Street-scapes/ Community Heritage Preservation	<ul style="list-style-type: none"> - increase range of attractions - opportunity to present lumbering and milling themes - improve and extend day-use 	<ul style="list-style-type: none"> - regional - provincial - national 	<ul style="list-style-type: none"> - tour groups (boat and steam train) - historical enthusiasts - school groups - transient auto traffic - transient boater traffic 	- year round	- medium	<ul style="list-style-type: none"> - promotion - development - operation - funding 	<ul style="list-style-type: none"> - funding - technical assistance - planning - development - liaison - promotion 	- good	<ul style="list-style-type: none"> - form local architectural conservation area committee - implement preservation and upgrading of commercial district - joint venture by merchants and local government
Co-operative Arts and Crafts Shop	<ul style="list-style-type: none"> - capitalize on local heritage theme - serve market generated by associated tourism development - improve and extend day-use potential - increases range of attractions 	<ul style="list-style-type: none"> - regional - provincial - national - U.S. 	<ul style="list-style-type: none"> - tour groups (boat and steam train) - school groups - transient auto traffic - transient boater traffic - cottagers 	- year round	- low	<ul style="list-style-type: none"> - funding - development - operation - promotion 	<ul style="list-style-type: none"> - funding - technical assistance - liaison - promotion 	- good	<ul style="list-style-type: none"> - feature products depicting lumbering and milling heritage - local artisans
Cafe	<ul style="list-style-type: none"> - improve and extend day-use potential - improve services to tourists 	<ul style="list-style-type: none"> - local - regional - provincial - national - U.S. 	<ul style="list-style-type: none"> - tour groups (boat and steam train) - cottagers - transient auto traffic - transient boater traffic 	- year round	- medium	<ul style="list-style-type: none"> - planning - funding - development - operation - promotion 	<ul style="list-style-type: none"> - planning - promotion 	- very good	<ul style="list-style-type: none"> - sidewalk tables in summer - should overlook Canal - feature history and artifacts from early lock period (1887-1910)
Interpretive Centre	<ul style="list-style-type: none"> - improve services to tourists - improve and extend day-use potential - consistent with scenic waterway and local heritage themes - increases range of attractions 	<ul style="list-style-type: none"> - provincial - national - U.S. 	<ul style="list-style-type: none"> - tour groups (boat and steam train) - transient auto traffic - transient boater traffic - school groups 	- year round	- medium	<ul style="list-style-type: none"> - promotion 	<ul style="list-style-type: none"> - planning - funding - development - operation - promotion 	- good	<ul style="list-style-type: none"> - present early history of lock development - audio-visual presentation of early use of locks and Trent Severn System
Expand Picnic Park	<ul style="list-style-type: none"> - improve services to tourists - improve and extend day-use potential 	<ul style="list-style-type: none"> - local - regional - provincial - national - U.S. 	<ul style="list-style-type: none"> - transient auto traffic - transient boater traffic 	- summer	- medium		<ul style="list-style-type: none"> - planning - funding - development - operation - promotion 	- very good	- adjacent to interpretive centre and existing picnic areas

TABLE 4.14
DEVELOPMENT OPPORTUNITIES
FENELON FALLS AREA
(continued)

OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Themed Restaurant	- improve services to tourists - improve and extend day-use and overnight stay potential	- local - regional - provincial - national - U.S.	- tour groups (boat and steam train) - transient auto traffic - transient boater traffic - cottagers	- year round	- medium	- planning - funding - development - operation - promotion	- planning - promotion	- very good	- present nineteenth century saw milling theme - restaurant now sits on old foundation, forebay remains intact
Upgrade Beverage and Entertainment Facility	- improve services to tourists - improve and extend day-use and overnight stay potential	- local - regional - provincial	- cottagers - transient auto traffic - transient boater traffic - overnight boater traffic	- year round	- low	- funding - development - operation - promotion	- planning - promotion	- very good	- removed from town-centre area - only establishment in area
Steam Train Tour	- encourage penetration into area - increase range of attractions - improve and extend day-use potential - opportunity to present heritage theme - linkage with other tourism development nodes	- local - regional - provincial - national - U.S.	- cottagers - tour groups (boats) - school groups - historical enthusiasts - steam train enthusiasts	- summer	- low	- funding - development - operation - promotion	- funding - promotion - liaison - technical assistance	- very good	- operate between Lindsay and Fenelon Falls - linked with boat and bus tours Lindsay, Rosedale and Kirkfield

FENELON FALLS AREA Day use

4.12



LAVENTHOL & HORWATH
MANAGEMENT CONSULTANTS

HASTINGS DEVELOPMENT STRATEGY

DEVELOPMENT ORIENTATION - DAY-USE

DEVELOPMENT THEME - NATIVE HERITAGE/MANUFACTURING

Hastings, located on Highway 45 on the Trent River System, is approximately a one and one-half hour drive north-east of Toronto and a half hour drive east of Peterborough. Originally a milling town, the community's economy is now based on small industry. From a tourism perspective, Hastings is an excellent location to act as a day-trip destination, a local service centre to both year-round and seasonal markets and a stop-off or resting point for traffic heading further north. The Trent River and a large island adjacent to the town provide good development potential for use by both auto and boater markets.

The development strategy for Hastings aims at increasing day-use visitation on a year-round basis. The intent of the proposed development opportunities is to increase the range of attractions and services available in the community. Few quality food and beverage facilities are available within the surrounding region and no particular urban centre attracts the food and beverage market. Due to its proximity to large urban centres and strategic highway access, Hastings has the potential to capture a significant share of the regional upscale food and beverage market. The primary target markets for Hastings are Ontario residents, particularly from Toronto and its environs, and some American visitors. The latter group is already attracted to the area for fishing. The primary seasonal market will be boaters utilizing the Trent Severn Waterway. To attract the boater market, the strategy focuses on providing sufficient recreational activities to encourage users of the waterway to lengthen their day visits to Hastings.

Hastings was significant in pre-historic times as the terminus of the Hastings to Percy Reach Portage. Consequently, the area is rich in archaeological remains of native habitation. By the late nineteenth century, the village was an industrial centre containing several

factories and mills. Many of the industrial, commercial and residential buildings from the area remain intact; hence tourism development in Hastings should capitalize on the rich native heritage and period manufacturing themes.

Development Opportunities

Specific details of proposed development opportunities are outlined in Table 4.15 and presented conceptually in Exhibit 4.13. The old mill in Hastings should be renovated to provide an upscale, licenced table service restaurant and entertainment facility. In the summer, the inclusion of a complementary licenced outside terrace should be provided. The development particulars are outlined below:

- 100-seat dining room
- 60-seat lounge
- 25-seat outside terrace
- 60 parking spaces

Boater access to the proposed restaurant is restricted due to the narrow channel entrance to the adjacent mill pond. Ideally, some widening of this channel should occur along with appropriate shoreline alterations for boat docking in order to reduce congestion in the area.

Adjacent to the old mill site is a large island which should be developed as an integrated recreation area to serve both boaters and motorists. Tourism-related development projects recommended for this site include the realignment of parking on the island closer to the roadway and construction of an information and interpretive centre themed around the town's milling history. Hastings is the southeastern gateway into the Peterborough-Haliburton Tourism Zone. The centre of the island should be developed as a creative play area for children. Additional boat docking will be necessary to accommodate both day-use and overnight boaters who may utilize these facilities. Along the opposite side of the island, a small bay exists which should be developed as a paddle boat activity

area. A rental outlet for paddle boats could either be incorporated into the mill restaurant development or an existing proximate commercial operation. All the recommended activities and facilities for the island should be linked by way of a recreation walk circling the island.

Currently, Hastings provides no tourism information centre readily accessible to motorists. The development of such a centre integrated with the town's municipal offices would be the most economical approach and a prime location in terms of access and visibility. A self-interpretive walking tour should originate at the tourist information centre. This tour would display period homes as well as historic, industrial and commercial structures within the area.

Fishing, particularly during the pickerel season, is a significant tourism generator for the Hastings area. Pickerel, however, are now considered a stressed species. In an attempt to capitalize on the village's reputation as a fishing area, yet conserving the pickerel stock, a bass fishing derby is recommended. A fishing derby at this location would create friendly competition with the one recommended for the western end of Rice Lake. A spring and summer derby could be held each year at alternate sites. One year Hastings could host the spring derby and the next year the summer derby. A pickerel derby could be based in Hastings. At the termination of the event, a fish-fry could be held at the proposed restaurant. The derby should be managed in similar fashion to the Canada-U.S. Walleye Tournament at Bobcaygeon where live release of fish is stressed. The fish are weighed and measured and then returned to the lake and bonus ounces are awarded for live releases.

One of the proposed boat tours, discussed in more detail on pages 248 to 252 of this report, will stop at Hastings. Lunch will be scheduled at the proposed restaurant and sufficient time will be given that the passengers may also explore the community's attractions. An open-air arts and crafts centre and specialty food shop are recommended to serve the boat tour patrons, motorists and private boaters. The craft centre would be linked to a river walk, while the cheese shop would be proximate to the main highway and Trent-Severn system.

A scenic and naturalist boat tour to include Serpent Mounds, the wild rice beds and the wildlife production areas is proposed from Hastings to Rice Lake. The town should stress the significance of the Rice Lake-Trent River area to the original native inhabitants of the area.

The Trent River is the key resource for the Hastings node. Development opportunities should maximize public access to and enjoyment of the water corridor, without creating adverse ecological pressure.

TABLE 4.15
DEVELOPMENT OPPORTUNITIES
HASTINGS

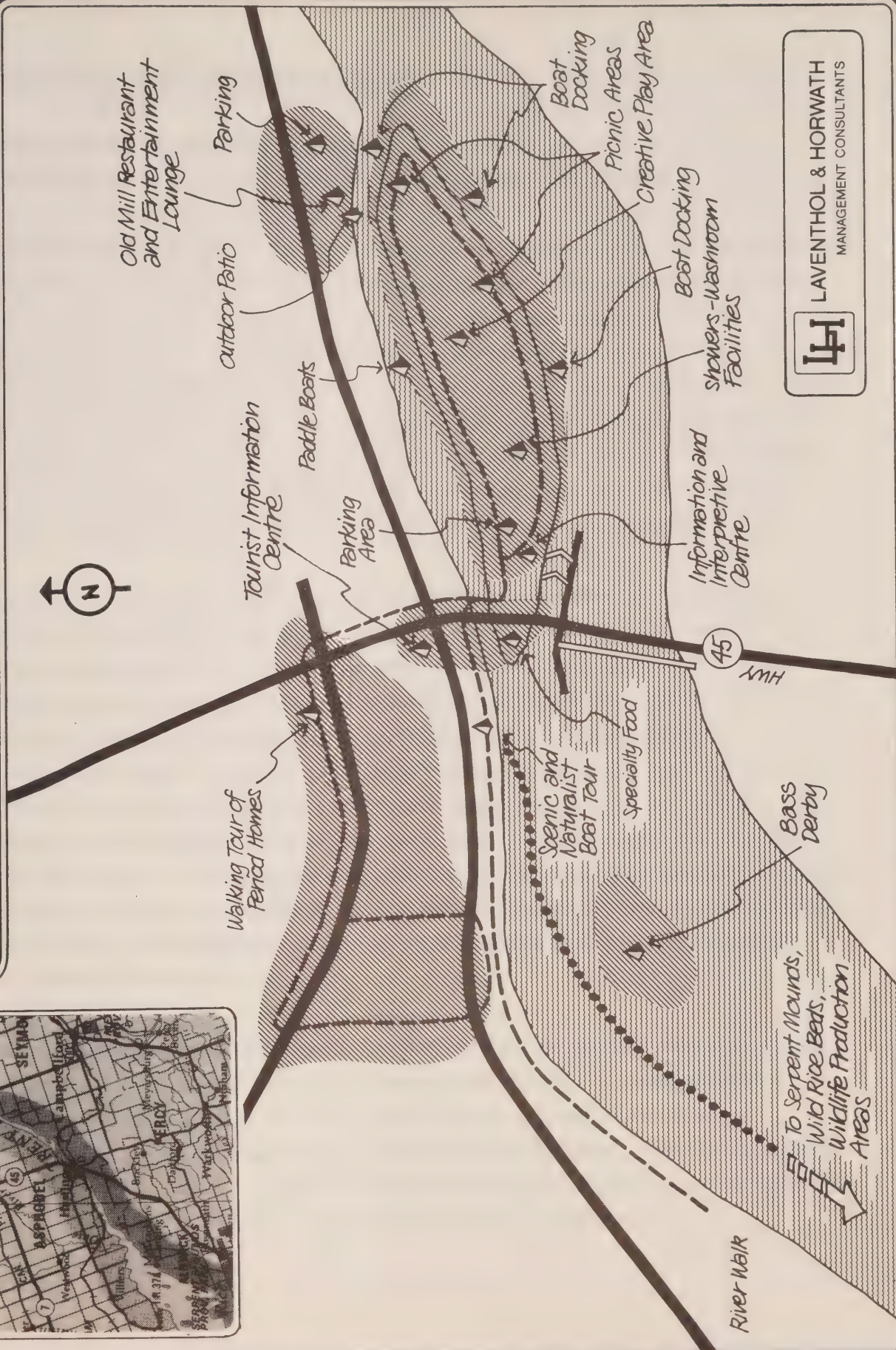
OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Mill Restaurant	- improve tourist facilities - meet needs of touring market - preserve heritage building - opportunity to present heritage	- local - regional - provincial - U.S.	- boat tour groups - bus tour groups	- year round	- low	- planning - funding - development - operation - promotion	- technical assistance - planning - promotion - funding	- very good	- include entertainment, outdoor terrace seating - high quality facility - high priority
Outdoor Arts & Crafts Centre	- increase range of attractions for day-use visitors	- local - regional - provincial - U.S.	- boaters - cottagers - resort guests - tour groups	- spring - summer - fall	- low	- planning - funding - development - operation - promotion	- promotion		- provides outlet for local talent
Paddle Boat Rental Outlet	- increase range of attractions for day-use visitors	- regional - provincial - U.S.	- boaters - cottagers - resort guests - children	- summer	- low	- planning - funding - development - operation - promotion	- promotion	- very good	
Bass Derby	- increase day-use visitation - increase range of attractions	- regional - provincial - U.S.	- fishing enthusiasts	- spring	- medium	- planning - funding - development - operation - promotion	- planning - promotion	- very good	- other activities such as fish-fry could be tied in with this - alternate hosting spring and summer derby with one on west Rice Lake
Information Interpretive Centre	- opportunities to present heritage and ecological themes - provide new service to boaters - increase day-use visitation	- regional - provincial - U.S.	- boaters - tour groups - school groups	- spring - summer - fall	- low	- promotion	- planning - funding - development - operation - promotion	- good	- boater-oriented
Specialty Food	- increase retail services to visitors	- local - regional - provincial - U.S.	- boaters - cottagers	- year round	- low	- planning - funding - development - operation - promotion	- promotion	- good	- provides an outlet for local products

TABLE 4.15
DEVELOPMENT OPPORTUNITIES
HASTINGS
 (continued)

<u>OPPORTUNITY</u>	<u>STRATEGY RELATIONSHIP</u>	<u>GEOGRAPHIC MARKET</u>	<u>SPECIALTY MARKET</u>	<u>SEASON</u>	<u>REGIONAL COMPETITION</u>	<u>ROLE OF PRIVATE SECTOR</u>	<u>ROLE OF GOVERNMENT</u>	<u>DEVELOPMENT POTENTIAL</u>	<u>FURTHER COMMENTS</u>
Tourist Information Centre	- increase services to day-use visitors	- regional - provincial - U.S.	- transient auto traffic	- year round	- low	- promotion	- planning - funding - development - operation - promotion	- good	- motorists-oriented
Creative Play Area	- increase range of facilities - improve day-use appeal	- local - regional - provincial - U.S.	- boaters - children	- spring - summer - fall	- low	- promotion	- planning - funding - development - operation - promotion	- good	
Picnic Park	- increase tourist facilities	- local - regional - provincial - U.S.	- boaters	- spring - summer - fall	- medium	- promotion	- planning - funding - development - operation - promotion	- very good	
Boat Docking	- increase tourist facilities - provide space for tour boat motoring	- local - regional - provincial - U.S.	- boaters - tour groups	- spring - summer - fall	- low	- planning - funding - development - operation - promotion	- technical assistance - promotion	- very good	
Walking Tour	- opportunities to present heritage themes - increase day-use appeal	- local - regional - provincial - U.S.	- history buffs - school groups - tour groups	- year round	- low	- promotion	- planning - funding - development - promotion	- good	- includes period homes, walk along river - require maps, signposting
Scenic & Naturalist Boat Tour	- increase range of attractions - opportunity to present natural history and ecology themes	- local - regional - provincial - U.S.	- school groups - tour groups	- spring - summer - fall	- low	- planning - funding - development - operation - promotion	- promotion	- good	- include Serpent Mounds, wild rice beds, wildlife production areas on Rice Lake
Washroom & Shower Facilities	- increase services to boaters	- regional - provincial - U.S.	- boaters	- spring - summer - fall	- low		- planning - funding - development	- very good	

HASTINGS Day use

4.13



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GAMEBRIDGE AREA DEVELOPMENT STRATEGY

DEVELOPMENT ORIENTATION - DAY-USE

DEVELOPMENT THEME - NATIVE PEOPLE/RECREATION GATEWAY

The area designated as the Gamebridge area development node is roughly centred at the intersection of Highway 12 and the Trent-Severn Waterway. Situated at the crossroads of two major transportation corridors, it is ideally suited as a western gateway to the Peterborough-Haliburton Tourism Zone. Visitors entering the zone can decide at this point either to continue north along the Lake Simcoe-Lake Couchiching shoreline or to turn into the zone toward the destination nodes at Dorset or Haliburton. Part of ancient Lake Algonquin, the Gamebridge area is characterized by low, relatively unforested terrain with numerous wet or marshy areas.

The development strategy for the Gamebridge area aims at increasing day-use on a year-round basis for the immediate area while serving as a launching point for encouraging greater penetration of the study zone. For those boaters travelling west, the lower Gamebridge locks mark the entrance to Lake Simcoe. Boaters travelling in an easterly direction could experience up to 24 more locks before leaving the zone at Hastings. The intent of the proposed development opportunities is to increase the range of facilities and services available to the visitor and to create an awareness of the attractions, facilities and services available in the immediate area and elsewhere in the Peterborough-Haliburton Tourism Zone. The dominant development theme is environment and historical/cultural landscape appreciation.

The Gamebridge area can expect to service all geographic markets: local, regional, provincial, national, United States and, to some extent, international markets as well. The largest segment will be the Metropolitan Toronto and the Golden Horseshoe markets. Cyclists, hikers, cross-country skiers, campers, cottagers, and transient auto and boater traffic should dominate the specialty market visitors.

Development Opportunities

As an area gateway, it is very important that the facilities and the services in the development node be located proximate to both the highway and waterway corridors. An essential ingredient for this development node will be a visitor information centre. During 1979, the summer average daily traffic and winter average daily traffic passing this point on Highway 12 was 8,000 and 2,650 vehicles, respectively. Over 11,412 boats passed through the lock during the 1979 operating season. A replica of an old lockmaster's house could house a themed restaurant portraying the history of the Trent-Severn Waterway and the local area. A picnic area should be developed for those wishing to dine out-of-doors. To accommodate the expected increase in the number of visitors arriving by both automobile and boat, the parking and boat docking areas will require expansion.

A co-operative native craft centre located within the development node should be established. It should be designed to create an awareness of the role played by the native people in the development of the area and to allow special craft displays in addition to providing an outlet for local artisan's products.

As a means of encouraging the visitor to explore the area other than through the use of an automobile or boat, a bicycle rental centre is proposed. Bicycle trails could be developed to link the area with the Kirkfield Lift Locks, MacKenzie House and Balsam Lake Provincial Park. A hiking trail should be developed from the Lake Simcoe shoreline to the Middle Gamebridge lock. Overnight camping is already available within the development node for those hikers, boaters or transient automobilers who wish to remain overnight. The hiking trail could provide naturalists with the opportunities to view flora and fauna indigenous to the Lake Simcoe Shoreline and the Thorah limestone plains area. During the winter, the trail could be used by cross-country skiers.

Overnight accommodation in the area is limited. Renovating the hotel, while maintaining its "rustic" appearance, would provide sufficient overnight accommodation for stranded day-use cyclists or hikers.

The development opportunities are listed in Table 4.16 and shown conceptually in Exhibit 4.14.

TABLE 4.16
DEVELOPMENT OPPORTUNITIES
GAMEBRIDGE AREA

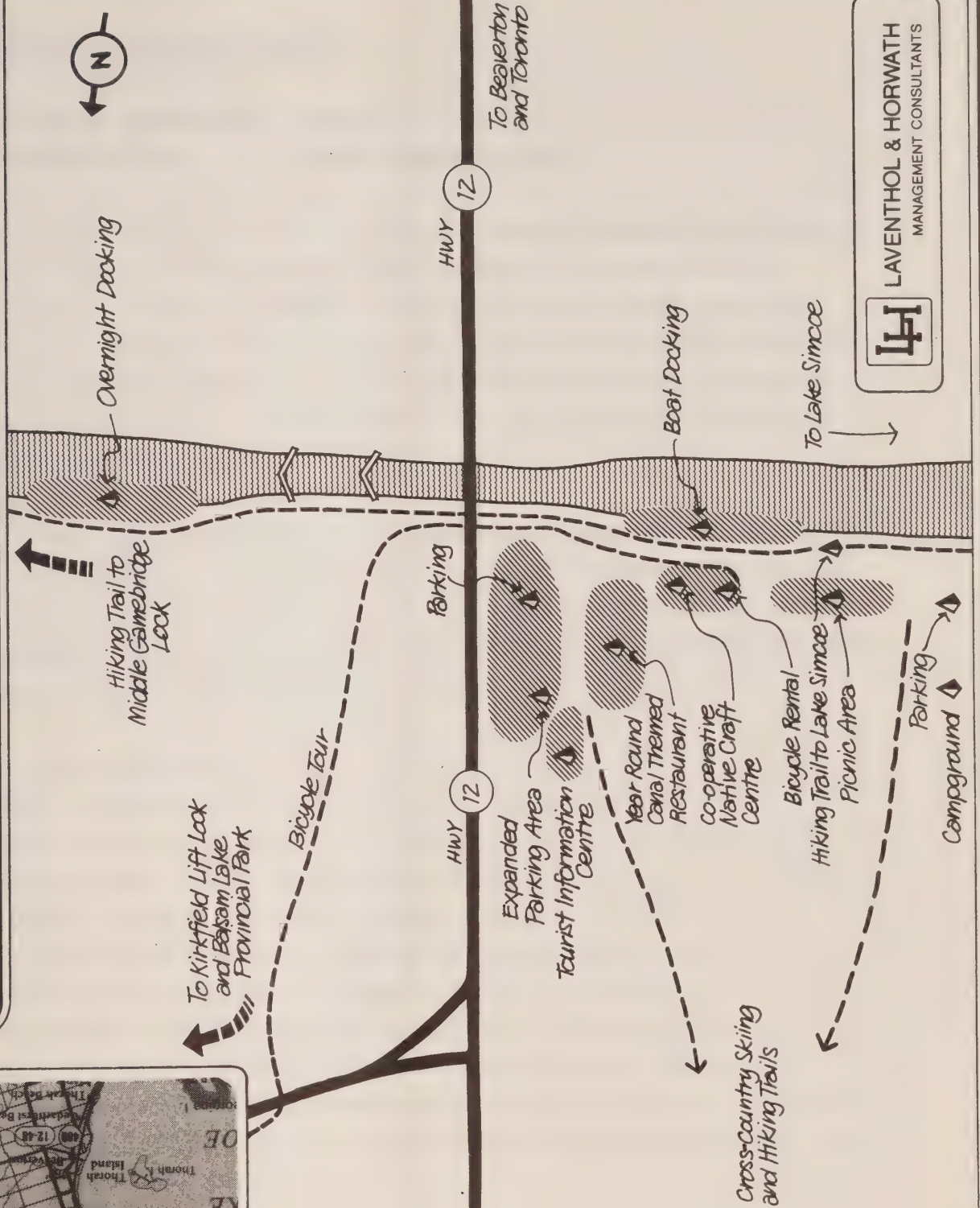
OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Hiking Trail	- encourage penetration of area - improve and extend day-use potential - increase range of attractions	- regional - provincial - national	- hikers - transient auto traffic	- summer	- medium		- planning - funding - development - operation - promotion	- good	- could be used for cross-country skiing in winter
Co-operative Native Craft Centre	- increase range of attractions - improve and extend day-use potential	- local - regional - provincial - national - U.S.	- transient auto traffic - transient boater traffic - tour groups - collectors	- summer	- low	- funding - development - operation - promotion	- planning - funding - liaison - promotion	- good	- require signage visible from highway - should feature local native artisans' work
Themed Restaurant	- improve services to tourists - improve day-use potential of area - create awareness of scenic waterway and lock system - extend season length	- local - regional - provincial - national - U.S.	- transient auto traffic - transient and over-night boaters - hikers - transient campers - cross-country skiers - cyclists	- year round	- medium	- funding - development - operation - promotion	- planning - promotion - funding	- very good	- require signage visible from highway - decor include early canal pictures and artifacts - build facility in replica of old lockmaster's house
Bicycle Rental Centre	- improve services to tourists - increase range of attractions	- local - regional - provincial - national	- cyclists - overnight boaters - transient campers	- spring - summer - fall	- low	- planning - funding - development - operation - promotion	- promotion	- good	- provide different method of exploring area
Develop Bicycle Trail	- increase range of attractions - encourage penetration of area - create linkage with area attractions	- local - regional - provincial - national	- cyclists - overnight boaters - transient campers	- spring - summer - winter	- low	- planning - funding - development - operation - promotion	- promotion - funding	- good	- require self interpretive signage, directional signage, local history and information package - linkage with Kirkfield Lift Locks, Mackenzie House, Balsam Lake Provincial Park

TABLE 4.16
DEVELOPMENT OPPORTUNITIES
CAMBRIDGE AREA
(continued)

OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Enlarge Boat Docking	- improve and extend day-use and overnight stay potential - provide improved access to Trent Severn System - improve facilities available to tourists	- regional - provincial - national - U.S.	- transient and over-night boaters	- summer	- low	- funding - promotion	- planning - development - funding - operation - promotion	- good	- high boater traffic volume - alleviate potential docking shortage
Tourism Information Centre	- provide service to existing and expanding tourist market - encourage penetration of area - improve and extend day-use and overnight stay potential	- provincial - national - U.S.	- transient auto traffic - transient and over-night boater traffic - transient campers - hikers - cyclists	- summer	- low	- operation	- planning - development - funding - promotion - liaison	- good	- gateway to study area - crossroads for auto and boater traffic - complement other tourism services - architecture
Picnic Park	- improve services to tourists - improve and extend day-use potential	- regional - provincial - national - U.S.	- transient auto traffic - transient and over-night boaters - transient campers - hikers - cyclists	- year round	- medium		- planning - development - funding - promotion - operation	- good	- ideal location adjacent to Canal and camping area
Upgrade Accommodation	- improve and extend overnight stay potential - provide service to existing and expanding tourist market	- provincial - national - U.S.	- transient auto traffic - tour groups	- year round	- medium	- funding - development - operation - promotion	- funding - technical assistance - liaison - promotion	- good	

4.14

GAMEBRIDGE AREA Day use



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ROSEDALE DEVELOPMENT STRATEGY

DEVELOPMENT ORIENTATION - DAY-USE

DEVELOPMENT THEME - NATURE INTERPRETATION

This small village, located on the Trent-Severn Waterway to the east of Balsam Lake, is a significant service centre for marine-oriented activities. Marinas proximate to the Rosedale Lock offer complete services to boaters and also serve snowmobilers in the winter season. With excellent highway access, Rosedale has the potential to attract motorists although, at present, there are not sufficient land-based attractions to encourage motorists to stop.

The development strategy for Rosedale is to increase day-use visitation by emphasizing the attractiveness of the area's natural resources and wildlife activity. Rosedale is not seen as having good winter tourism potential. The proposed developments concentrate on capturing a larger share of summer and shoulder season visitation.

The existing market consists primarily of Ontario residents who are either enroute to private cottages or other accommodation centres in the area or are cruising the Trent-Severn Waterway. Private boaters are the largest segment of the existing market for Rosedale. The development intent is aimed at capturing a larger proportion of vehicular traffic passing through Rosedale on Highway 35 and encouraging greater numbers of boaters on the Trent-Severn Waterway to stop in Rosedale. The primary market will continue to be Ontario residents, especially from the Toronto area, with Other Canadians, Americans and Europeans constituting a limited secondary market. Development opportunities focus on upgrading the existing tourism infrastructure and creating new attractions oriented to the day-use visitor.

Development Opportunities

The development opportunities for the Rosedale node are detailed in Table

4.17 and are presented conceptually in Exhibit 4.15. In all cases, development opportunities identified and implemented should be designed to respect the integrity of the environmentally sensitive habitat and wildlife present in the area. Commercial development within this area has been limited to only basic tourism requirements in order to maintain the very attractive natural resource base.

Interpretive opportunities associated with the natural environment and canal technology form the basic tourism draws for this node. A significant waterfowl area exists at Rosedale which should be linked to the lock area by a nature trail and boardwalk. Interpretive signage and displays should be placed strategically along this route. Development should be executed in such a manner that dramatic wildlife viewing positions are created which help to provide travellers with an understanding of wildlife environments in the area.

A self-guided walking tour to the Rosedale dam and old locks should also be developed and established as an attraction which explains canal technology and its influence on the surrounding environment.

To further serve day-use visitors to the area, a beach and picnic area should be created. Access to this recreation area can be afforded from the nature trail and a docking facility near the Rosedale Lock.

To service those tourists drawn to the attractions described above as well as motorists passing through Rosedale on Highway 35, the development of a themed early 1900's general store is proposed. Visibility from the highway will be a key element to the success of this facility. The store will act as a service centre for local cottagers as well as transient motorists and boaters. It should be designed to sell convenience items, recreation equipment, hardware, fresh fruit, vegetables and ice cream.

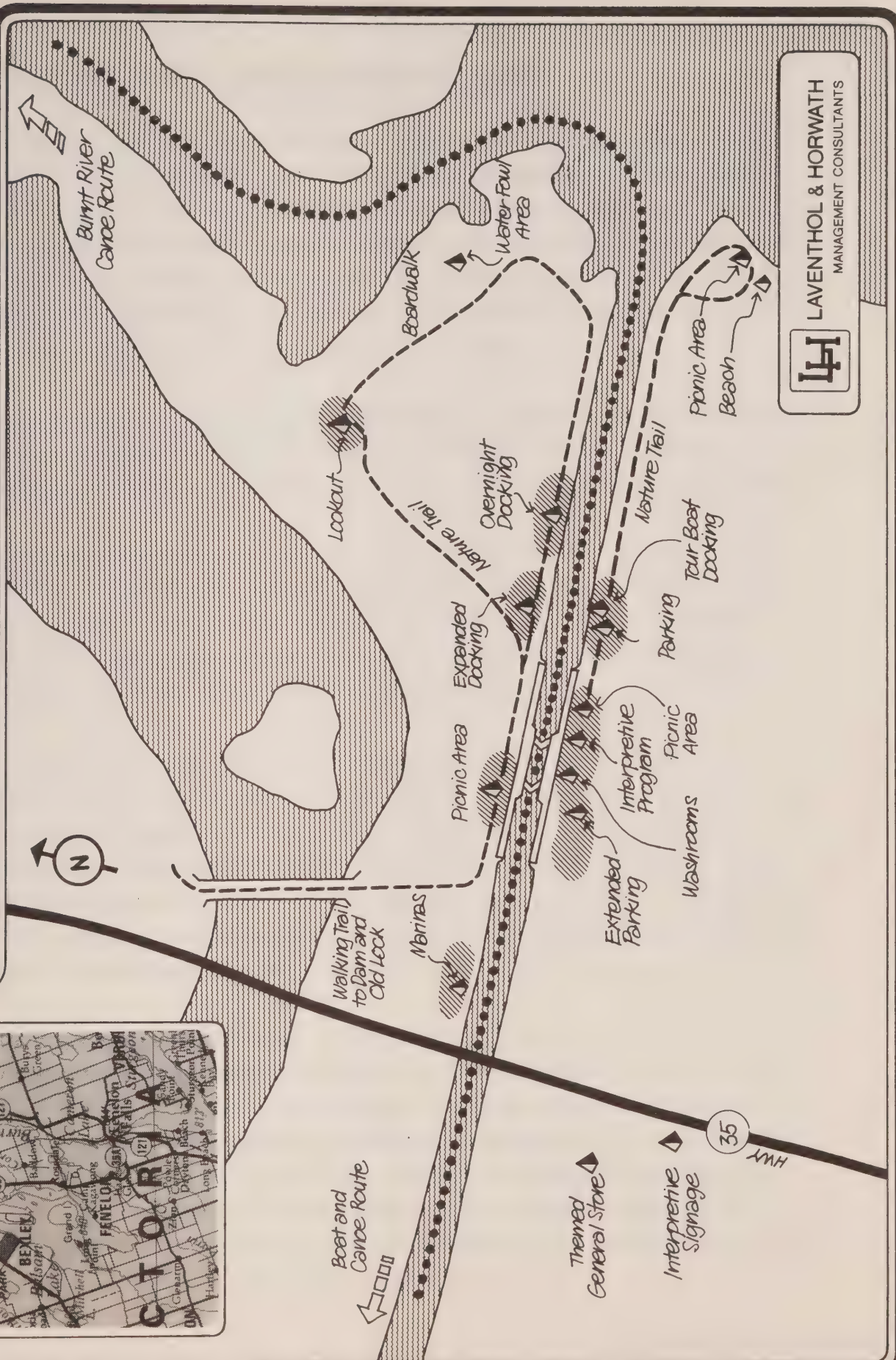
TABLE 4.17
DEVELOPMENT OPPORTUNITIES
ROSEDALE AREA

OPPORTUNITY	STRATEGY RELATIONSHIP	GEOGRAPHIC MARKET	SPECIALTY MARKET	SEASON	REGIONAL COMPETITION	ROLE OF PRIVATE SECTOR	ROLE OF GOVERNMENT	DEVELOPMENT POTENTIAL	FURTHER COMMENTS
Themed General Store	- increase range of attractions - provide highway traffic draw - improve day-use potential - increase services available to visitors	- local - regional - provincial	- tour groups - boaters - cottagers - auto travellers	- year round	- medium	- planning - funding - development - operation - promotion	- promotion - technical assistance	- good	- tie in with interpretive signage for area
Nature Trail To Scenic Outlook and Boardwalk to Waterfowl Area	- improve use of natural resources - improve day-use potential - increase facilities for day-use outdoor recreationists	- local - regional - provincial	- cottagers - tour groups - outdoor recreational enthusiasts - boaters	- summer - fall	- low		- planning - funding - development - operation - promotion	- very good	- boardwalk through the waterfowl area - interpretive signage on trail and at lookout required - lookout to be developed at waterfowl area
Nature Trail To Proposed Beach and Docking Area	- improve use of natural resources - increase range of attractions - improve day-use potential	- regional - provincial	- auto travellers - boaters - tour groups	- summer	- medium		- planning - funding - development - operation - promotion	- good	- picnicking areas at beach and enroute to beach required
Development of Additional Docking	- provide tour boat access - improve day-use potential - increase boater participation	- local - regional - provincial	- tour boat groups - boaters	- summer	- low		- planning - funding - development - operation - promotion	- very good	- additional docking to accommodate tour boats and overnight docking

ROSEDALE AREA

Day use

4.15



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TRENT-SEVERN TOURING CORRIDOR DEVELOPMENT STRATEGY

The Trent-Severn Waterway traverses the entire southern portion of the study area from Washago at the head of Lake Couchiching to the village of Trent River in the southeastern corner of Peterborough County. Users of this system can travel to Georgian Bay to the west of the study zone and to the Bay of Quinte to the south. The waterway is a major recreational corridor and heritage route which serves as the key link between the tourism development nodes located on its shores.

Users of the waterway include houseboaters, fishermen, cottagers, resort guests and local residents. They are primarily Ontario residents, although a significant number originate in the United States and Europe.

Development opportunities on the Trent-Severn Waterway consist of a variety of boat tours, some of which are supplemented by bus and rail trips. These tours should make use of accommodation and foodservice facilities along the waterway and focus on the cultural and heritage attractions found within the Trent-Severn corridor.

It is expected that many of the groups participating in these tours will arrive at the embarkation point by charter bus; therefore, the tours are designed to handle a bus load, i.e. approximately 40 people. Day trippers can be accommodated for portions of some of the longer tours. Families, senior citizen's groups, and boating enthusiasts from Ontario, other Canadian provinces and northern United States will constitute the market for these excursions.

The suggested tours involve all combinations of boat, rail and bus transportation, and vary from single day excursions to one and two and three night stop-overs (Table 4.18). The first tourists to visit the area, starting in the 1830's, travelled to communities on the waterway via stagecoach and later by train. They then boarded steamboats and travelled to cottages or resort hotels. To commemorate this early recreational era, at least one of the proposed tours should use a replica of an early Canadian paddle boat (e.g. Esturion).

TABLE 4.18
PROPOSED TRENT-SEVERN WATERWAY TOURS

<u>TOUR</u>	<u>ORIGIN</u>	<u>TRANSPORTATION</u>	<u>STOPS</u>	<u>OVERNIGHT</u>	<u>MEALS</u>
I	Kirkfield	Tour Boat	Fenelon Falls	Accommodation	Lunch
	Fenelon Falls	Tour Boat	Bobcaygeon		Dinner, Breakfast
	Bobcaygeon	Tour Boat	Burleigh Falls	Accommodation	Lunch
	Burleigh Falls	Tour Boat	Lindsay		Dinner, Breakfast
	Lindsay	Bus	Kirkfield		
II	Lindsay	Steam Train	Fenelon Falls	Accommodation	Lunch
	Fenelon Falls	Tour Boat	Kirkfield		Dinner, Breakfast
	Kirkfield	Bus	Jackson's Point		
	Jackson's Point	Bus	Lindsay		
III	Lindsay	Steam Train	Fenelon Falls		
	Fenelon Falls	Steam Train	Lindsay		
IV	Lindsay	Tour Boat	Bobcaygeon	Accommodation	Dinner, Breakfast
	Bobcaygeon	Tour Boat	Burleigh Falls	Accommodation	Lunch
	Burleigh Falls	Tour Boat	Lakefield		Dinner, Breakfast
	Lakefield	Tour Boat	Peterborough	Accommodation	(Lunch on Board) Dinner, Breakfast
	Peterborough	Bus	Lindsay		
V	Peterborough	Tour Boat	Lakefield	Accommodation	(Lunch on Board) Dinner, Breakfast
	Lakefield	Tour Boat	Burleigh Falls	Accommodation	Lunch
	Burleigh Falls	Tour Boat	Bobcaygeon		Dinner, Breakfast
	Bobcaygeon	Tour Boat	Lindsay	Accommodation	Dinner, Breakfast
	Lindsay	Bus	Peterborough		
VI	Peterborough	Tour Boat	Hastings	Accommodation	Lunch
	Hastings	Tour Boat	Rice Lake Resort		Dinner, Breakfast
	Rice Lake Resort	Bus	Serpent Mounds		Lunch
	Serpent Mounds	Bus	Hiawatha Craft Centre		
	Hiawatha Craft Centre	Bus	Rice Lake Resort		
	Rice Lake Resort	Tour Boat	Peterborough		

Tour I begins at Kirkfield, where group members can visit the historic MacKenzie House, once the home of William Mackenzie, legendary Canadian railroad builder, some interesting antique and crafts shops and the Illini Art Gallery. The group will then board the tour boat at the Kirkfield Lift Lock which is an example of the engineering ingenuity used in the construction of the waterway. The boat will cruise through Balsam Lake and Cameron Lake to Fenelon Falls, where passengers will disembark for lunch, shopping and a tour of the museum. They may follow the proposed historic walking tour of the community, which will take them along the river and past the heritage buildings of the town where interpretive signs and material will emphasize the milling and lumbering history of Fenelon Falls. The tour guides should take advantage of the interpretive programs at the lock stations to explain the history of the waterway communities and the importance of the Trent- Severn system to their development.

At Fenelon Falls, tour members have the option of boarding the steam train for Lindsay (described in more detail in Tour III) or continuing by boat. Those who choose the steam train will have dinner and attend a production of the Kawartha Summer Theatre in Lindsay after which they may then return to their point of origin that evening or stay overnight and return in the morning. Those who continue by boat will head for Bobcaygeon where they will dine and stay overnight. While in Bobcaygeon, group members can take a walking tour of the town which passes by the signposted heritage buildings and includes a visit to the proposed Boyd House Museum which will expose visitors to the colourful story of Mossom Boyd. Side trips to Petroglyphs Provincial Park and the Whetung Native Craft Centre could be arranged.

In the morning, the boat will travel to Burleigh Falls, where it will stop for lunch. Passengers can learn of the legend of Lovesick Lake and observe the place where the events in the story took place. They will have an opportunity to watch or participate in whitewater kayaking at this location. The stop in Burleigh Falls presents an opportunity to introduce tour members to the natural history and ecology themes of the

Trent-Severn Waterway. The tour will then return to Lindsay for an evening of dinner and theatre. The passengers will travel to their point of origin by bus the following morning.

Tour II starts in Lindsay, travels via steam train to Fenelon Falls in time for lunch and sightseeing, and continues by boat to Kirkfield. Group members board a bus at Kirkfield for Jackson's Point where they will have dinner, attend a performance at the Red Barn Summer Theatre and stay overnight. While in Jackson's Point, passengers can participate in the many proposed recreation opportunities in the area and can visit historic Eildon Hall in Sibbald Point Provincial Park. Group members will return to their point of origin the next morning.

Tour III is a one-day return excursion via steam train from Lindsay to Fenelon Falls. The train will run several times a day, a one-way trip taking approximately 45 minutes. This will give users of the train the flexibility to explore both communities at their leisure. While in Lindsay, visitors can rent bicycles to tour the many heritage attractions of the community. The 19th century themed streetscape will present a unique shopping experience.

The steam train will serve to represent the transportation heritage theme. From the 1850's to the 1920's, rail travel was the dominant mode of transportation and was essential to the growth of the communities in the study area. It provided access to markets for the lumber industry and opened up the Kawarthas to tourists. Other established train excursions in North America have proved to be very popular with families, school groups, tours and railroad enthusiasts.

Tour IV starts in Lindsay with an early afternoon departure which allows tour groups time to get to Lindsay to enjoy the town's attractions and have lunch. The boat will travel to Bobcaygeon on the first day, where passengers will stay overnight. On day two, the boat will cruise through the scenic waters of Pigeon, Buckhorn and Lovesick Lakes and stop for lunch in Burleigh Falls. The rest of the day will be spent travelling to

Lakefield, where the group will spend the night. The third day covers the Lakefield-to-Peterborough stretch of the Otonabee River. Passengers will stay overnight in Peterborough and return home the next day.

While in Peterborough, tour groups can visit the Centennial Museum, Hutchison House, several art galleries and Trent University. They can observe the operation of the famous liftlock, visit the adjacent activity centre, attend a performance at Arbour Summer Theatre, shop and enjoy Peterborough's nightlife. Tour members can rent paddle boats or try the vita parcouer in the park near Lock 20. They can also stroll through the proposed waterfront park in downtown Peterborough which will offer a wide variety of attractions.

Tour V follows the same route as Tour IV, but begins in Peterborough and ends in Lindsay. On the last night in Lindsay passengers can see a play at the Kawartha Summer Theatre.

Tour VI will commence in Peterborough and proceed to Hastings in time for lunch at the proposed historic mill restaurant. Passengers will be able to explore the village via a proposed walking tour and visit an open air arts and crafts market before re-boarding the boat and travelling to a Rice Lake resort. The following morning they will visit Serpent Mounds Provincial Park to see the prehistoric Indian burial grounds and the proposed Indian arts and crafts centre at Hiawatha. The tour guides' commentary should focus on the Indian history of the area and on the ecology of the lake. This portion of the tour gives passengers an opportunity for viewing wildlife areas. In the afternoon the group will return to Peterborough.

It is possible to combine some of these tours for those visitors wishing a longer stay. For example Tour IV and Tour VI could be paired, as could Tour III and Tour V. All are designed to minimize ecological pressure on the Trent-Severn Waterway by encouraging group travel under controlled circumstances. The tours will be a cohesive force that binds the common heritage themes evident in the waterway communities.

PUBLIC AND PRIVATE SECTOR ROLES AND RESPONSIBILITIES

The implementation of the tourism development strategies recommended in this report requires direct action on the part of both the public and private sectors. In broad terms, the public sector must encourage and vigorously support private tourism projects in order for the industry to prosper. This can be accomplished through strategically designed programmes of research, information distribution, training/education, marketing, promotion, technical and financial assistance and, in some cases, infrastructure and attraction development. The private sector should continue to be the primary risk-takers by implementing most of the development opportunities.

The degree of responsibility and participation in the actual implementation of tourism development opportunities in this strategy varies according to the type of development node. At day-use nodes, the public sector should be responsible for either developing recreation facilities (e.g. picnic areas, scenic lookouts, historic plaques) which are necessary components of the day-use support system, or providing technical or financial assistance to the private sector for their creation. The primary role of the private sector should be to provide other commercial recreation programmes, facilities and activities (e.g. boat tours, food and beverage facilities, etc.).

The development of overnight nodes will require the public sector to provide feasibility support information to the potential investor, as well as technical assistance in the implementation and promotion of the developed opportunity. In large part, the private sector should be responsible for developing the various facilities, services and programmes suggested in the strategy. Where programmes exist for funding the development, upgrading or expanding accommodation or food and beverage establishments, it is expected that the public sector will have a definitive role.

Extended-stay nodes require a comprehensive and fully co-ordinated programme of co-operation between both the public and private sectors. The public sector should first focus its efforts upon establishing capital works programmes which enable the creation of high quality tourism infrastructures (i.e. roads and sewage facilities) and then upon marketing these areas in an effective fashion. The private sector should concentrate its efforts upon the development of quality accommodation and associated tourism facilities which link the nodal elements together in a thematically integrated fashion.

Government Roles

More specific government related functions which are recommended in order to stimulate tourism investment in this area follow. They relate to the prime government agencies associated with tourism in the study zone. These are CORTS, Parks Canada, Ministry of Industry and Tourism, Ministry of Natural Resources, Ministry of the Environment and Ministry of Culture and Recreation.

CORTS

As the co-ordinating agency in establishing recreation land-use guidelines and optimum recreation use within the Trent-Severn corridor, CORTS must encourage the establishment of travel generators along the waterway. Opportunities exist along the waterway for the creation of strategically positioned picnic areas, interpretive/display centres, marina facilities and transient accommodation units (e.g. campground). Such programmes would enhance the waterway's ability to attract and hold visitors to the zone.

Parks Canada

As official custodian of the Trent-Severn canal system, Parks Canada must establish close and co-operative ties with the private sector in the development and management of tourism development opportunities. In many

instances, through its lockage system, water control programme, and on-site services and facilities, Parks Canada channels the flow of a large tourist segment to and within the zone. It is recommended that Parks Canada should:

- Establish, in conjunction with the tourist industry, season length and daily hours of operation schedules which match the requirements of boaters and marina operators who are dependent upon the lock system for passage and business traffic, respectively;
- Create more effective methods of controlling the type and distribution of boat use along the corridor. Boating activity is currently severely concentrated in certain areas, thereby creating various carrying capacity problems for boaters and management alike. Efforts should be made to develop attractions at various points along the system (e.g. Rice Lake, Lindsay) which will help to redistribute current boater traffic;
- Through the use of the information/interpretive centres, encourage visitor penetration into development nodes adjacent to its property;
- Encourage the development of more transient boater marine facilities along the Trent-Severn Waterway which are designed to pull boaters through the entire system.

Ministry of Industry and Tourism

As the Provincial Ministry is primarily responsible for encouraging tourism development within the study zone, it is recommended that the Ministry of Industry and Tourism:

- Actively work with other Provincial Government ministries in order to encourage relevant capital works programmes which can assist in the establishment of the necessary infrastructure for viable tourism development;

- Present the strategy perspective of this study in a formal manner to all land-use decision-making influences within the study zone (e.g. commissions, authorities, planning boards, etc.) whenever proposed programmes are contemplated which may have an impact on the future of the tourist industry in this zone;
- Encourage the incorporation of relevant portions of this strategy into the official planning processes of those areas in which tourism opportunities have been suggested;
- Assist tourism developers and investors in gaining the necessary government approvals for the projects consistent with this strategy;
- Market and promote tourism activities and programmes in a manner consistent with the themes and images described in this strategy.

Ministry of Natural Resources

As the leading provincial ministry in CORTS and custodian of several Provincial Parks, park reserves and Crown land, the Ministry of Natural Resources has several functions in this strategy. Within the study zone, there are numerous opportunities to expand and improve tourism participation by this Ministry. In particular, the Ministry of Natural Resources should:

- Market its Provincial Parks and park reserves as travel generating attractions rather than as camping destinations within the study zone;
- Encourage use of its parks by day-use groups using commercial tourism facilities within the zone;
- Establish linkages between the parks and surrounding communities with respect to using private sector tourism facilities while staying within park boundaries;

- Establish and promote hiking trails, cross-country ski trails, canoe routes and other tourism corridor systems on Crown Land between development nodes;
- Increase fish stocking programmes adjacent to development nodes in order to increase tourism flows to areas where such programmes can generate a reasonable return in terms of angling opportunities, jobs and revenue;
- Increase programmes to encourage non-consumptive forms of wildlife viewing.

Ministry of the Environment

Within its mandate of protecting the quality of the environment, the Ministry of the Environment has a key role in improving the opportunities for tourism in the zone. This strategy suggests the following:

- Clear and concise environmental policy on a provincial and regional level as it affects new and existing development is essential. Where existing uses are causing an environmental problem, strict enforcement of environmental regulations should occur and general guidelines for new development related to the magnitude of the development should also be made available.
- Based on the opportunities identified in this strategy and, in particular, major opportunities, the Ministry should develop specific guidelines, standards and criteria for the projects.

Ministry of Culture and Recreation

The role of the Ministry of Culture and Recreation should be expanded as it pertains to tourism development in this zone. In particular:

- The Ministry should expand its identification programme within the zone in order that the area's heritage resources can be designated with descriptive material covering such elements as date of construction (if appropriate), original and present use, ownership, condition, historical background and, perhaps, some rating of significance;
- A stronger heritage programme is required. Incentives to preserve and renovate heritage structures might better be achieved if Provincial and Federal programmes could increase the incentive to do so at the local level. The Ministry should also be in a position to cost share with local municipalities' heritage/tourism studies such as those undertaken in the zones. It should also assist in their actual implementation.

Municipal Governments

The value of tourism to a community is often underestimated. Municipal governments should take a more active role in tourism development. In particular:

- Detailed planning at the local level is required in order to establish the policies for tourism development. Municipal governments are in a position to coordinate the diverse and sometimes competing interests in those areas which affect tourism. Clear and concise local tourism policy would make the tourism planning and development process more efficient.
- Municipalities can do the most to improve local image and ensure proper theming. Programs at the local level, especially visual improvement programs and recreational improvements, probably have the greatest impact on travellers to the area. Attractive streetscapes, parks, watercourses and roadside development can do much to improve the visitor's impression of the area and establish a framework conducive to expanding opportunities. Short-sighted

local planning and development is probably the greatest deterrent to improving the environment for tourism.

Private Sector

Public sector actions recommended in this strategy are designed to reduce the barriers to successful tourism development which have traditionally plagued investors in this zone. However, the private sector must recognize the strengths and weaknesses of the zone's resource base as well as the intensity of competition for tourists if it is to be successful once the bureaucratic red tape has been cut. To help facilitate the optimum level of performance for the tourism industry, this strategy recommends that the private sector perform certain functions. These include the following:

- Currently there is little direct co-operation among operators. In only a limited number of cases does one operator (i.e. a resort owner) make arrangements with another tourism operator (i.e. a squash court owner) to combine their resources for increased tourism business. Numerous development opportunities have been identified in this strategy where, through co-operative efforts between complementary tourist/recreation businesses, the overall attractiveness of the area could be strengthened. Tourism entrepreneurs associated with the same development node should work together in terms of co-operative physical theming, activity packaging, and promotion. Independent private sector owners should encourage the marketing of attractions, events and programmes as clusters which complement each other rather than as individual entities.
- Substandard service and poorly maintained tourism facilities detract from any favourable images which might be associated with the zone. Upgrading has been recommended as a development strategy at many points in this report. Any private sector improvements to

the physical tourism plant should be themed in keeping with the images being portrayed within the particular development node.

- A major deterrent to tourism development within this zone is a lack of appreciation on the part of many municipalities of the benefits to be received from a strategically created tourism business combined with private cottager resistance. Private operators should, whenever possible, use this report to favourably influence local municipal officials to accommodate opportunities identified within future development programmes.

Public/Private Sector

It is particularly important that the tourism industry not act as a highly segmented and fragmented entity. Dovetailing of roles and functions between the public and private sectors, as well as within each of these sectors, should occur. The tourism industry should work closely together on a variety of important issues confronting them in the next decade.

- Energy cost and availability for tourism looms as a potentially severe constraint to future travel. The industry should develop integrated destination areas which reduce traveller dependency upon private automobiles. Proximity of at least the southern portion of the development zone to Metropolitan Toronto and other major urban centres in Southern Ontario should increase the marketability of the area on an overnight and weekend basis.
- Environmental degradation of the resource base (e.g. acid rain) poses a very real and extremely dangerous situation for water and forest-oriented tourism development. The industry should develop a vigorous lobby designed to address and deal immediately with this problem in a manner appropriate to tourism investors.

- Positive attitudes towards tourists among local residents in tourism receiving communities can be a significant "competitive edge" in today's marketplace. The industry should familiarize local communities with the increasing importance of general community hospitality as a travel attraction. Tourists are normally "shared customers" and community members from all walks of life share the benefits of their presence either directly or indirectly.
- Tourism development has been hampered within this zone by a generally insensitive and unsympathetic planning process. The industry should work to obtain the formal commitment of local communities to appropriate forms of tourism development. Tourism development should be recognized as an integral part of official planning documents and programmes.
- Travel and promotional programmes are currently fragmented and do not create a focussed travel image. The industry should develop a structure and the appropriate programmes for the zone's Travel Association which reflect the area's marketable images and the requirements of a rapidly changing market.
- Financial assistance programmes designed to assist tourism developers are limited in numbers and scope. These programmes should be designed to ensure that their scope, eligibility criteria, and level of assistance are suited to the particular nature of the industry in this zone.

CONCLUSIONS

Tourism within the Peterborough-Haliburton Tourism Zone is in a highly competitive league and the competition is increasing. The zone has experienced considerable success in attracting visitors from local, regional, provincial and United States markets over the years.

While tourism growth in recent times has been relatively static and the general quality of the zone's tourism facilities and resource base have been allowed to slip to some extent, the area is still capable of attracting more visitors and more tourism dollars. Of course, this task will not be easy to accomplish. It will require action. It will need a co-ordinated and co-operative push on the part of both public and private sector members of the tourism industry. It will require the implementation of planning principles and development guidelines which closely reflect the thrust of this tourism strategy.

Tourism within the Peterborough-Haliburton Tourism Zone is everyone's business. Because of this fact, no one has either taken charge of it or given it a planned sense of common direction and purpose. This strategy provides such a plan. It must be built on using the energy, creativity and entrepreneurial skills of an enthusiastic tourism industry. Without this commitment, it is unlikely that tourism will attain the economic and social position which it has the potential to achieve.

